

# Bi-Weekly Report as of March 21, 2003

## FSA Performance Plan – FY2003



## **SUMMARY**

### **COMPLETED**

- No projects were reported under this category for this reporting period.

### **GREEN LIGHT**

- Funding has been approved for Project 20 – Improve the management of student aid through data sharing and consolidating common borrower services and functions.
- Funding has been approved for the Debt Management Collection System (DCMS) effort with FMS. This milestone contributes to the success of Project 5 – Develop trial balance capability for each operating partner to facilitate and expedite the reconciliation process.

### **YELLOW LIGHT**

- The first briefing with the Department, FSA and GAO was held on March 17, 2003 to demonstrate that FSA and the Department have addressed or have plans and management in place to address the relevant issues raised in GAO's January 2003 report regarding FSA's High Risk status. (Project 2)
- FSA and OCFO are finalizing the closing schedule so that FSA can meet the metric of reconciling FSA accounts to the Department's general ledger within 30 after month-end close. (Project 3)

### **RED LIGHT**

- The overall Data Strategy Project (Project 16) is behind schedule but some of the teams continue to make progress. The draft schemas were completed and delivered to the NCHELP Electronics Standards Council. The first draft of the Common Student ID solution will be presented to the Business Integration Group on March 27. The data strategy team delivered a new business case to be presented to the DSG and IPC for review.

### **DATE CHANGE REQUEST**

- Milestone 9.2 – Identify improvements and fill gaps in current operational procedures related to reconciliation – requests that the March 31 completion date be extended to August 31 because some reconciliation and closeout functions are not scheduled for implementation until June. Procedures for these cannot be written until the requirements are completed. In addition, staff assigned to 9.2 has been required to focus on immediate COD issues.

### **CLOSED**

- Project 19 – Develop and implement initial phases of an enterprise-wide customer service solution that incorporates best-in-business technology and enhanced business processes – has been officially closed because funding was denied for this project. Shutdown processes have been implemented for the CRM4FSA project and the Release 1 Pilot.

# ACTION PLAN STATUS AT A GLANCE

as of March 21, 2003








FSA No.	Indicator	Status
1	Obtain a clean audit opinion on FSA's financial statements	✓
2	Develop and execute an FY03 plan to get off the GAO High Risk List	Y
3	Reconcile FSA accounts to Department's general ledger within 30 days after month-end close by 9/30/03	Y
4	Implement the proper accounting structure and appropriate internal controls in all systems impacted by FSA's system integration and technology solution initiatives	
5	Develop trial balance capability for each operating partner (ACS, Raytheon, EDS, COD) to facilitate and expedite the reconciliation process	Ⓢ
6	Address material weaknesses and reportable conditions in audits	
7	Implement Form 2000 enhancements needed since original deployment in October 2000	Ⓢ
8	Determine the scope of the Debt Management Collection System (DMCS) reengineering	✓
9	Improve school's fund management, reconciliation, and close out processes	Ⓢ
10	Stabilize the Lender Application Process (LAP) and Lender Reporting System(LaRS)	Ⓢ
11	Enhance Program Monitoring and Oversight	
12	Develop and standardize an integrated contract management approach that utilizes performance measures that are directly linked to the business case objectives	
13	Create an Enterprise-level dashboard of productivity and performance metrics	✓
14	Develop and/or implement workforce alignment (business processes, skills, etc.) initiatives and actions to support FSA performance goals and One-ED objectives	
15	Implement integrated project management oversight for FSA's system integration initiatives	
16	Define an enterprise-wide data strategy and high-level implementation approach that addresses the business flow of data across the enterprise, architecture, primary ownership, standards, management, access methods, and quality	Ⓢ
17	Analyze Personal Identification Number (PIN) issues related to enterprise wide management/architecture strategy	Ⓢ
18	Create an overall FSA integrated security and privacy architecture	Ⓢ
19	Develop and implement initial phases of an enterprise-wide customer service solution that incorporates best-in-business technology and enhanced business processes	CLOSED
20	Improve the management of student aid through data sharing and consolidating common borrower services and functions	Ⓢ
21	Define strategy for EDExpress reengineering	Ⓢ
22	Develop an outreach strategy for Aid Awareness in support of OPE and tied to "No Child Left Behind"	
23	Upgrade technology and integrate CPS across the enterprise	
24	Conduct NSLDS Analysis and begin phased implementation of solution	
25	Complete the recommendations outlined in the OIG audit (A07-C001) Audit of Enterprise Architecture, issued September 30, 2002	
26	Evaluate our participation in all events	
27	Implement Master Promissory Note for PLUS	Ⓢ
28	Enhance our cash transaction process to accommodate OCFO procedures	
29	Augment Leveraging Educational Assistance Partnerships (LEAP)/Supplemental Leveraging Educational Assistance Partnership (SLEAP) module in FMS to enable direct electronic data exchange with GAPS and enhance the operational abilities	
30	Obtain a clean financial opinion for ED through: improving FMS internal processes, programs, controls; supporting reconciliation activities between FSA Operating Partners, FMS, FMSS, GAPS and Treasury; provide integration with FSA reengineered systems; and perform upgrade analysis and implementation of Oracle Federal Financials Release 11i	Ⓢ
31	Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives	
32	Develop an automated tool to administer budgetary resources for FSA's programs and to provide management with the data to effectively manage those resources	

**Key:**













- On Track
- Progress Concerns
- Management Intervention Required
- ✓ Completed

## MILESTONE PLAN STATUS AT A GLANCE

*as of March 21, 2003*

FSA No.	MILESTONE	Status
<b>1</b>	<b>Obtain a clean audit opinion on FSA's financial statements</b>	
1.1	Work with the Department to obtain a clean audit opinion	
1.2	Work with the Department and auditors to assure full compliance with Federal Financial Managers Improvement Act (FFMIA), Federal Managers Financial Integrity Act (FMFIA), and other laws and regulations	
1.3	Work with the Department to correct all material internal control weaknesses identified in the financial statement audit report	
1.4	Review internal controls in Financial Management System (FMS) to ensure that data is accurate, reliable, available and timely to maintain adequate stewardship and accountability	
1.5	Participate with Budget Services in determining credit reform subsidy estimates	
1.6	Enhance 'Splitter' process in Financial Management System (FMS). Review FMS and Accounting Division Operations processing	
1.7	Assist in the preparation of all Department-wide financial statements	
<b>2</b>	<b>Develop and execute an FY03 plan to get off the GAO High Risk List</b>	
2.1	Review GAO Guidance, OMB concerns and FY 2002 High Risk Plan outcomes and status	
2.2	Determine necessary action items for FY 2003 and update plan	
2.3	Validate plan with FSA Senior Leaders, Department Advisors and share with GAO and OIG	
2.4	Finalize plan	
2.5	Demonstrate progress in having implemented corrective measures through improved accountability mechanism assuring addresses necessary reporting requirements for Performance Plan, Department's Strategic Plan, MIT and President's Management Agenda	
2.6	Develop internal communications infrastructure	
2.7	Update plan monthly as necessary	
2.8	Meet with and/or inform GAO and OMB on progress and internal monitoring regularly	
<b>3</b>	<b>Reconcile FSA accounts to Department's general ledger within 30 days after month-end by 9/30/03</b>	
3.1	Complete FSA reconciliations for FY03 for all Balance Sheet accounts using Standard General Ledger (SGL)	
3.2	Transition FSA reconciliations to FSA Accounting Division Staff	
3.3	Identify resources and FTE's needed for FY03 reconciliation effort	
3.4	Review current reconciliation process to improve audit trail of data from Operating Partners to FMS to Financial Management System Software (FMSS) and from FMS to/from Grant Administration and Payment System (GAPS)	
3.5	Develop an automated methodology to reconcile cash transactions in FMS to the Treasury banking system	
3.6	Coordinate with OCFO to reconcile all Standard General Ledger (SGL) accounts for FSA appropriations	
3.7	Work with FSA system owners and Operating Partners to research and resolve any reconciling differences	
3.8	Work with FSA system owners and Operating Partners to resolve any systemic issues	
3.9	Enhance FMS to populate all attributes needed for reconciliation	
3.10	Enhance FMS to integrate the transaction ID from GAPS	

<b>4</b>	<b>Implement the proper accounting structure and appropriate internal controls in all systems impacted by FSA's system integration and technology solution initiatives</b>	
4.1	Establish board members to include operating and system accountants	
4.2	Establish meeting frequency	
4.3	Develop account validation framework for system development and ongoing certification of accounting and program systems providing financial management data	
4.4	Review all accounting treatment to ensure compliance with Standard General Ledger (SGL) accounting	
4.5	Develop framework for measuring whether the accounting validation is working by performing independent post production validation	
<b>5</b>	<b>Develop trial balance capability for each operating partner (ACS, Raytheon, EDS, COD) to facilitate and expedite the reconciliation process</b>	<b>G</b>
5.1	Establish a system development workgroup, including ED-OCFO, FSA-CFO, FSA Management and Program Area, Operating Partners, to develop detail requirements specific to each program area	
5.1.1	Review and document each operating system (providing for consistency among and within systems)	
5.2	Develop chart of accounts for each operating partner (sub-accounts is pre-requisite) in FMS	
5.2.1	Develop Trial Balance at each Operating Partner	
5.3	Utilize an automated tool to balance and reconcile all financial transactions received from Operating Partners	
5.4	Work with Operating Partner to balance and reconcile all financial transactions	
5.5	Roll up support balances in Financial Statements	
5.6	Debt Management Collection System (DMCS) complies with FMS subsidiary ledger reconciliation requirements	<b>G</b>
<b>6</b>	<b>Address material weaknesses and reportable conditions in audits</b>	
6.1	Strengthen financial reporting to ensure full compliance with OMB Circular A-123, Management Accountability and Control, and Credit Reform guidance	
6.1.1	Ensure that the newly implemented financial management system supporting FSA's financial management and reporting needs is working effectively and adequately integrated with the Department's general ledger	
6.1.2	Use FMSS to produce a general ledger trial balance at the reporting group level or at a consolidated level	
6.1.3	Identify, research, and correct account differences and validate proper posting	
6.1.4	Minimize use of manual adjustments to correct discrepancies, and maintain sufficient documentation to support accuracy and completeness of adjustments, including their preparation, review and approval	
6.2	Prepare/review quarterly and annual financial statements in accordance with OMB form and content guidance 01-09	
6.2.1	Follow established policies and procedures for preparation of quarterly financial statements, quarterly analysis of trial balance accounts and quarterly reconciliation of feeder systems to FMS and from FMS to FMSS	
6.2.2	Define approaches to corroborate account balances for all significant accounts on a monthly or more frequent basis, as appropriate. Ensure the accuracy of reported account balances	
6.2.3	Maintain sufficient documentation to support differences in the subsidiary records and the general ledger records	
























6.2.4	Review trial balances and financial statements for follow up on unnatural balances in financial statements	
6.2.5	Perform proper and timely reconciliation's of financial accounting records. Identify, research, resolve and document reconciliation differences of all significant accounts, both proprietary and budgetary, general ledger (GL) and subsidiary, in a timely manner	
6.2.6	Verify accounting processes for FMS' new Lender Reporting System (LaRS)	
6.2.7	Prepare quarterly Schedule 9 reports for loans receivable	
6.2.8	Use data mining and other approaches to search for duplicate payments and research improper payments that are identified and refine internal controls in response to such efforts	
6.3	With the implementation of Common Origination and Disbursement (COD), remind schools that report Pell and DL disbursement data of the requirement to complete verification of selected students	
6.4	Improve monitoring mechanism to reduce the repeat of prior material weaknesses and reportable conditions	
6.4.1	Review auditor's report on financial statements and participate in the development of plans and actions and milestones to address any outstanding reportable conditions and Management Letter recommendations	
6.4.2	Hold regular meetings to review and discuss status of current actions developed to respond to audit report recommendations	
<b>7</b>	<b>Implement Form 2000 enhancements needed since original deployment in October 2000</b>	
7.1	Gather user comments and requirements	
7.2	Validate and prioritize business requirements/enhancements	
7.3	Separate operational corrective actions identified in 2001 and 2002 from enhancements	
7.4	Define and compile operational and enhancement requirements	
7.5	Add electronic corrections ability	
7.6	Validate processing outcomes through user testing and accounting treatment verification	
7.7	Begin to integrate enhancements in Data Mart Release III build to create integrated view for scorecard and submission reporting	
7.8	Manage work group and Steering Committee for business process corroboration	
<b>8</b>	<b>Determine the scope of the Debt Management Collection System (DMCS) reengineering</b>	
8.1	Validate whether to recompet the contract with limited reengineering or pursue increased reengineering through FSA system integration and new technology solution initiatives	
8.2	Commence either a contract recompet or fully reengineering project to redeploy the system	
<b>9</b>	<b>Improve school's fund management, reconciliation, and close out processes</b>	
9.1	Reduce time to deliver funds to schools	
9.2	Identify improvements and fill gaps in current operational procedures related to reconciliation	
9.3	Implement systematic notifications and operational procedures related to disbursement to drawdown ratios	
9.4	Retire Pell's Recipient Financial Management System (RFMS) and the Direct Loan Origination System (DLOS)	
<b>10</b>	<b>Stabilize the Lender Application Process (LAP) and Lender Reporting System(LaRS)</b>	
10.1	Validate submissions and financial processing through regression testing	











10.2	Verify the full performance functionality of the extensions built in Oracle Financial Management System (FMS)	✓
10.3	Establish a CFO/Financial Partners operational management and integration work group	
10.4	Check and analyze the quarterly submissions for all quarters in FY03 for accuracy and proper accounting treatment and funding transactions	G
10.5	Coordinate submissions, outcomes, remittance processing, and data quality with regional reviews initiative scheduled for FY03	G
<b>11</b>	<b>Enhance Program Monitoring and Oversight</b>	
11.1	Develop and deliver an Enterprise-wide Program Monitoring Plan	✓
	<b>Student Eligibility</b>	
11.2	<b>Student Applicant and Disbursement Data</b>	G
11.2.1	Develop a plan to continue to identify, measure and monitor applicant and payment error	G
11.2.2	Implement Phase I of the plan	
11.2.3	Develop and deliver training to staff on needs analysis, verification and conflicting documentation	G
	<b>School Oversight</b>	
11.3	<b>Integrate School Information Systems</b>	
11.3.1	Reengineer and streamline Case Management and Oversight (CMO) business processes to reduce decision making timeframe and achieve increased consistency of outcomes	G
11.3.1.1	Implement electronic audits and financial statements	G
11.3.1.2	Define requirements and conceptual design for workflow tool to facilitate processes (most likely Postsecondary Education Participation System (PEPS) reengineering)	G
11.3.2	Define measures for compliance/ oversight activities to demonstrate the effectiveness of case management including technical assistance	✓
11.3.3	External Training	G
11.3.3.1	Plan, design and build a "100 Series" of basic training for schools	G
11.3.3.2	Develop and deliver a program integrity training for schools through a combination of videoconferences , web-based training, and classroom experiences	Y
11.4	<b>Partner Oversight</b>	
11.4.1	Enhance the use of available financial partner data by implementing Phase III of the Financial Partners Data Mart	G
11.4.2	Continue enhanced oversight of lenders/servicers and guarantee agencies through improved consistency and risk management tools	G
11.5	<b>Risk Management and Default Prevention Strategies</b>	
11.5.1	Demonstrate improved risk management and default prevention strategies	
<b>12</b>	<b>Develop and standardize an integrated contract management approach that utilizes performance measures that are directly linked to the business case objectives</b>	
12.1	Standardize approach and processes	
12.2	Provide training and support to all project managers (PMs), Contracting Officer Representatives (CORs), all stakeholders and accountable contract entities on the new process and performance measures that monitor business case expectations/ outcomes against achieved results	
12.3	Pilot process with one project and refine process based upon pilot	
12.4	Implement new process across all projects	
12.5	Establish outcome-based performance measures and framework for FSA and partners to manage performance	
12.5.1	Convene Performance Measures Working Group	
12.5.2	Develop industry best practice framework to manage performance	
12.5.3	Pilot proposed framework on measuring customer interaction	

13	<b>Create an Enterprise-level dashboard of productivity and performance metrics</b>	✓
13.1	Develop a plan to identify metrics that are auditable, repeatable, can measure the quality of business services and delivery at the aggregate and service delivery level, and are compliant with the Statement of Federal Finance Accounting Concepts and Standards (SFFACS), where appropriate	✓
13.2	Implement Phase 1 of this plan	✓
14	<b>Develop and/or implement workforce alignment (business processes, skills, etc.) initiatives and actions to support FSA performance goals and One-ED objectives</b>	
14.1	Begin to align with/participate in One-ED	Y G
14.2	Establish organization alignment teams to work across channels to determine/execute the to-be-state	
14.3	Define HR systems requirements and work with ED (Time and Attendance, Retirement)	
14.4	Align functions, unit configuration, and work responsibilities with new system integration and technology solutions	G
14.5	Expand Career Zone (CZ) offerings to include new system and technology solutions	G
14.5.1	Expand Career Zone offering to include Title IV basics - programs, delivery system, negotiated rulemaking. Build and deliver "Partnering for Performance" sessions	G
14.6	Review, update and use the FSA skills catalog	Y
14.6.1	Review and update FSA skills catalog	Y
14.6.2	Conduct gap analyses based on skills catalog (business units TBD)	Y
14.6.3	Provide learning opportunities to fill skills gaps	Y
14.7	Develop learning track for case management teams	G
14.7.1	Conduct research and analysis of skills needed to perform specific jobs	G
14.7.2	Create the curriculum, focusing on "data driven" approach	G
14.7.3	Conduct skills assessment	G
14.7.4	Provide learning options to fill gaps	G
14.8	Align Manager Excellence Training to focus on Performance and Accountability	G
14.9	Assess the feasibility of implementing web-based Performance Management Process (PMP) that incorporates Education Department Performance Appraisal System (EDPAS) and Individual Develop Plan (IDP)	
14.10	Add the career counseling component to FSA Career Zone	
14.10.1	Obtain adequate funding	✓
14.10.2	Determine the order of magnitude of the impacted employees	
14.10.3	Identify relevant employee support needs	
14.10.4	Work with Acquisitions and Contract Performance (ACP) to develop Statement of Work (SOW) and the feasibility of interagency agreements.	
14.10.5	Award contract	
14.10.6	Develop/execute communications plan	
14.11	Ensure availability of physical space for service providers	
15	<b>Implement integrated project management oversight for FSA's system integration initiatives</b>	
15.1	Provide program management support for FSA system integration and new technology solution initiatives	✓
15.1.1	Issue a task order under the Modernization Partner Contract to ensure continued support for integration, leadership, direction setting, reporting and contract/subcontract management	
15.2	Formalize FSA Integration Group	✓



16	<b>Define an enterprise-wide data strategy and high-level implementation approach that addresses the business flow of data across the enterprise, architecture, primary ownership, standards, management, access methods, and quality</b>	
16.1	Identify the strategic focus areas necessary to develop a cohesive enterprise-wide data strategy	
16.2	Collaborate with all internal Department stakeholders and external stakeholders to identify business needs and requirements with respect to the data provided to FSA by others, provided by FSA to others, and managed by FSA	
16.2.1	Map the current state and future state business flow of data, as applicable, across the enterprise	
16.2.1.1	Inventory legacy/operational data, including different databases and data stores, to identify redundancy	
16.2.1.2	Determine where business data should be integrated	 
16.2.2	Develop requirements and initial design for Common Identifiers for School and Students.	
16.3	Determine Current Data Quality and Establish Target State Plan and Quality Assurance Process	
16.3.1	Evaluate and identify data quality problems and identify correct source of data	
16.3.2	Develop a data cleansing plan based on cost, value and urgency	
16.3.3	Develop and administer a data quality process which ensures the FSA projects implement enterprise data standards and quality standards	
16.3.4	Establish an FSA data quality committee comprised of both business and technical subject matter experts to ensure that enterprise data standards are addressed within each project	
16.4	Develop an enterprise-wide extensible markup language (XML) Technical Architecture Framework to enhance data sharing and standardization with our external customers	
16.4.1	Develop an XML framework including: and FSA XML Vision, XML standards, governance process, methodology, XML technical core components, sector libraries, and schemas	
16.4.2	Develop an integrated sequencing plan that identifies when and how each initiative will implement the XML framework as part of an overall enterprise data integration plan	
16.4.3	Establish Common Record XML format	
16.4.4	Identify initial requirements and initial design for XML Institutional Student Information Report (ISIR)	
16.4.5	Complete development activities to implement XML for ISIR for 2004-05	
16.5	Develop integrated Data warehouse and data mart strategy	
16.5.1	Develop Data Warehouse and Data Mart Vision	
16.5.2	Develop Data Warehouse and Data Mart Framework	
16.5.3	Develop technical standards and guidelines	
16.5.4	Develop a strategy for enterprise wide data sharing and distribution (data storage, management and access rights)	
16.6	Develop technical standards, conventions, and data management guidelines	
16.7	Review Security and Privacy Procedures and revise as necessary	
16.8	Develop an enterprise web services/portal strategy	
17	<b>Analyze Personal Identification Number (PIN) issues related to enterprise wide management/architecture strategy</b>	
18	<b>Create an overall FSA integrated security and privacy architecture</b>	
18.1	Convene FSA security and privacy architecture working group and provide support for meetings and deliberations	
18.2	Review past work plan and update the plan with the latest business and technical developments that are applicable	

18.3	Integrate FSA needs with Departmental and government wide initiatives (e.g. Critical Infrastructure Protection, Enterprise Architecture, eAuthentication, etc.)	
18.4	Recommend technical approaches to each of the security services (e.g., encryption, authentication, etc.) required by FSA (and partner organizations)	
18.5	Identify and estimate the cost of all FSA projects that will require modification to fit within the proposed enterprise security/privacy standards	
18.6	Implement one or more proof-of-concept infrastructure improvements, with specific intention to develop an identity management infrastructure (enrollment, use of school or lender XML identity credentials, Single Sign-On) to support business-facing (school/lender/GA, not Personal Identification Number-based (PIN-based) student/borrower) applications	
<b>19</b>	<b>Develop and implement initial phases of an enterprise-wide customer service</b>	
19.1	Develop a common platform to manage customer interactions	
19.2	Link the common platform to pre-attending, attending, and post-attending	
19.3	Implement an integrated customer view	
19.4	Implement a process to continuously improve products and services based on	
19.5	Develop and implement a workforce transformation strategy aligned with overall	
19.6	Develop an enterprise-wide knowledge management tool for Operating Partners,	
19.7	Ensure common platform conforms to security and privacy policies	
19.8	Move system of record ownership for student demographic data from legacy	
19.9	Develop Customer Service/Interaction business processes and data model, and	
19.10	Link the common platform to schools and financial partner customers, which	
19.11	Develop a standard process to manage both control and non-control mail to	
19.12	Customer interaction analysis	
19.13	Improve Customer Service for Schools	
19.13.1	Implement New Tool for Customer Service Call Center (CSCC)	
19.13.2	Recommendations for consolidated customer service functions	
19.13.3	Implement transfer capability between key schools channel delivery call centers	
19.13.4	Begin to implement enhanced functional interactive voice response (IVR) routing	
19.13.5	Use data to identify trends from back-end systems and customer service	
19.13.6	Perform analysis of work already complete towards knowledge repository (e.g:	
19.13.7	Implement enhancement to schools portal through integrated views & business	
19.14	Complete & make operational the Program Development Division's (PDD's)	
19.14.1	Contract for imaging services	
19.14.2	Implement plan for profiling of imaged documents	
19.14.3	Deploy Knowledge Data Base	
<b>20</b>	<b>Improve the management of student aid through data sharing &amp; consolidating</b>	
20.1	Identify common functions in Servicing, Consolidation, & Collections	
20.2	Identify interdependencies & constraints for integration of common services	
20.3	Implement quick hits	
<b>21</b>	<b>Define strategy for EDEExpress reengineering</b>	
21.1	Define Strategy for EDEExpress reengineering	
<b>22</b>	<b>Develop an outreach strategy for Aid Awareness in support of OPE &amp; tied to</b>	
22.1	Analyze current Student Aid Awareness pubs & costs, & validate strategy	
22.2	Determine additional portal functionality	
22.3	Design & build Release 3 of Students Portal to incorporate revised publications &	
<b>23</b>	<b>Upgrade technology &amp; integrate CPS across the enterprise</b>	
23.1	Develop a plan for upgrading CPS	
23.2	Requirements & design for upgrading CPS	
<b>24</b>	<b>Conduct NSLDS Analysis &amp; begin phased implementation of solution</b>	
24.1	Deliver NSLDS Action Plan	
24.2	Begin to implement the detailed technical hardware & software design of the	
24.3	CIO will begin the effort to re-platform the NSLDS	
24.4	Complete the technical hardware & software re-platform	
<b>25</b>	<b>Complete the recommendations outlined in the OIG audit (A07-C001) Audit of</b>	
25.1	Implement the OIG recommendations to strengthen the linkages between	

25.2	Continue to populate, validate the information in the enterprise architecture	
25.3	Procure additional EA tool licenses, tool maintenance	
25.4	Develop a process flow to manage the information in the FSA enterprise	
25.5	Develop the requirements & technical product to export the FSA enterprise	
<b>26</b>	<b>Evaluate our participation in all events</b>	
<b>27</b>	<b>Implement Master Promissory Note for PLUS</b>	
27.1	Implement PLUS electronic Master Promissory Note (eMPN) for DL	
<b>28</b>	<b>Enhance our cash transaction process to accommodate OCFO procedures</b>	
28.1	Work with Operating Partners, Contractors & OCFO to establish transaction-	
28.2	Work with Operating Partners & Financial Institutions to identify & correct	
28.3	Enable FSA to identify differences before month-end & reduce Treasury	
28.4	Develop & automated methodology to reconcile cash transactions in FMS to the	
<b>29</b>	<b>Augment LEAP/SLEAP module in FMS to enable direct electronic data</b>	
29.1	Solicit & compile community/user requirements	
29.2	Meet & define Financial Management System (FMS) to GAPS connectivity &	
29.3	Test & validate the processing stream & edits with internal & external participants	
29.4	Define an operational work group comprised of FSA CFO, Financial Partners,	
29.5	Define strategy to enable additional reporting capabilities	
29.6	Provide feeders to Financial Partners Data Mart in conjunction with Release III	
<b>30</b>	<b>Obtain a clean financial opinion for ED through: improving FMS internal</b>	
30.1	Upgrade to Oracle Database 11i	
30.2	Integrate the transaction ID from GAPS	
30.3	Enhance FMS Operations processing	
30.4	Implement Federal Administrator	
30.5	Implement Guaranty Agency Forms 2000 Enhancements	
30.6	Implement Program Change Requests	
30.7	Implement FSA/Title IV Web-based (Draw-down) Capability & Award Processes	
30.8	Integrate & interface with Debt Management & Collection System (DMCS)	
30.9	Complete Tier 2 & Tier 3 of Headquarters' Oracle Implementation Approach	
<b>31</b>	<b>Support ED, customers &amp; business partners by participating in the President's</b>	
31.1	E-Gov Support:Implement & participate in cross-gov initiatives including eLoans	
31.2	Cross Agency Web Support:Support operations & usability of existing interagency	
31.3	New R&D: Provide support for pilot tests, proofs of concept, research, white	
<b>32</b>	<b>Develop an automated tool to administer budgetary resources for FSA's</b>	
32.1	Determine requirements for program fund management that are consistent with	
32.2	Investigate options that are compatible with Oracle financials, will integrate with	
32.3	Select an option that meets reqmnts, test for ability to meet reqmnts & decide	
32.4	Implement pilot based on decision	

# Appendix A - Project Status Report

Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
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1	CFO	Obtain a clean audit opinion on FSA's financial statements			
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Green

3/21/2003	CFO is finalizing our audit plan for FY03 and will meet with OCFO next week to coordinate the audit plans and PBC (Provided by Client) lists for the Department and FSA. We will not have a final PBC listing until the new auditors are selected and deliver it to us. However, CFO held preliminary meetings with PBC owners in the Channels to coordinate the production of known PBCs.	11
3/7/2003	The financial statements for the first quarter of FY03 were submitted timely by OCFO. FSA did not receive them until after transmission to OMB. Therefore, no analysis was completed. We will work with OCFO to receive and properly analyze the second quarter financial statements. Work has started to refine and consolidate schedules and queries which are likely to be requested by the auditors for FY03.	10
2/11/2003	Both the Department and FSA received a clean opinion on the FY'02 audit. Multiple action plans and efforts will be put into place during FY'03 to improve our processes, analysis and reconciliations to enhance our probability of receiving a clean audit in FY'03.	100
2/11/2003	Corrective action plans for findings of material weaknesses and internal control issues are due in 60 days.	100
	First quarter financial statements are due to CFO Monday, February for review and analysis. These statements are due to OMB by February 15th.	
1/27/2003	Clean audit opinion was rendered on 1/27/03	100
1/10/2003	Currently working with OCFO to achieve clean audit opinion. Ernest & Young (auditors) has delivered the official draft reports to the Office of Inspector General (OIG) for review. OIG will deliver the official draft reports to OCFO/FSA January 10th. ED's consolidated written comments are due to OIG/E&Y by January 16th.	95
12/27/2002	Currently working with OCFO to achieve clean audit status	90

2	COO	Develop and execute an FY03 plan to get off the GAO High Risk List			
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Yellow

Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
			3/21/2003	Discussions, validation and refining of strategy held between COO and Deputy Secretary. Briefings with GAO to be held on areas raised in GAO's January 2003 report to demonstrate FSA/Department have addressed or have plans and management in place to address. Issues deal with financial management, enterprise architecture, systems modernization, maintaining program integrity, the prevention and collection of defaulted loans and human capital management issues. The first briefing was held March 17, 2002 covering the Department's Enterprise Architecture. The joint presentation by ED-OCIO and FSA-CIO was well received and well attended by FSA and Department management representatives.	03
			3/7/2003	Letter for the Secretary's signature requesting reconsideration provided to participants at Performance Meeting and to the Channel Heads for comment. The letter was also provided to MIT, the DepSec's and Legislation as a head's up and in support of 3/12/2003 Hoeksra Hearing proposed actions to address the high-risk designation. The updating of the FSA Five Year Plan (to include the FY 2003 Annual Plan), the timely submission of the FY 2002 Annual Report (to include the list of accomplishments against all the FSA projects in the FY 2002 plan), the continued improvements to the FSA financial management infrastructure and processes and procedures, finalization of the Default Management Strategies, continued/enhanced emphasis on program monitoring, timely development of the FSA Consistent Data Framework, meeting modernization/integration/enterprise architecture requirements/goals and assuring that FSA is fully engaged in One-ED and addressing Human Capital future needs is key to success of this effort.	25
			2/7/2003	FSA was on GAO's High Risk List for FY 2003, issued January 30, 2003, supported by work ending and ongoing through December 2002. In January, FSA received a clean opinion on its FY 2003 financial statement audit - thus the major obstacle for being removed from the GAO High Risk List has been overcome, although not timely enough to affect the January 2003 GAO High Risk designation. However, the FSA is requesting a reconsideration of the designation in FY 2003, in consideration of the clean audit, the plans for continued financial management improvement, and the commitment by management to address the issues, as demonstrated in the FSA and Department Annual Plans, the Department's Strategic Plan and other more detailed plans. This item will remain yellow until we have assurance that GAO will provide us with an interim assessment. It will turn red if GAO decides not to provide us with an interim assessment. At this time the COO of GAO knows that there will be a formal request and is open to discussing the request internally.	25
			1/24/2003	Although the draft financial statement audit report indicates that FSA is going to receive a clean opinion (thus the major obstacle for getting off of the GAO High Risk List will have been overcome), until we have assurance that GAO will provide us with an interim assessment prior to the end of the fiscal year the project will remain yellow.	10
3	CFO	Reconcile FSA accounts to Department's general ledger within 30 days after month-end close by 9/30/03			
Yellow					
			3/21/2003	FSA and OCFO are finalizing the closing schedule so that FSA can meet the metric of reconciling 30 days after month-end. The FSA Operating Partner to FMS to FMSS reconciliations has been completed for the December period.	55
			3/7/2003	Reconciliations (including analyzing and resolving differences) for the month of December are behind schedule due to delay in closing FMSS. The timely closing of FMSS is critical to FSA meeting target dates for completion of reconciliations. FMSS has not yet closed month of December	50

<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
			2/11/2003	November reconciliations were completed in a timely manner. The FMSS preliminary trial balances have been received by FSA during the week of February 3rd. The December period reconciliation process has begun.	50
			1/27/2003	Reconciliations (including analyzing and resolving differences) for the month of November are on schedule to be completed and approved within the 40-day goal of month-end close for the first quarter reconciliations. More specifically, 1) Initial work has begun on new methodology to reconcile the Direct Loan advance account. Coordinating with the Schools channel to reconcile from School (i.e., SAS, 732 report etc). 2) Forms 2000 November reconciliations are in the review process and will be forwarded to management for approval on 1/27/03. 3) FMS (pre) to FMS (post) reconciliations are in the review process and will be forwarded to management for approval on 1/27/03. This includes Direct Loan financing fund (x4253), FFELP liquidating fund (x0230) and financing fund (x4251). 4. FMS (post) to FMSS reconciliations are in the review process and will be forwarded to management for approval on 1/27/03. This includes Direct Loan financing fund (x4253), FFELP liquidating fund (x0230) and financing fund (x4251). 5. Initial work has begun on a new methodology to reconcile FSA grant funds for the FMS (pre) to FMS (post) and FMS (post) to/from GAPS and to FMSS. FMS (post) to FMSS reconciliations are in the review process and will be forwarded to management for approval on 1/27/03. This includes Direct Loan financing fund (x4253), FFELP liquidating fund (x0230) and financing fund (x4251). 7. Support provided to ED to complete November DCMS reconciliations, which have been forwarded to management for review and approval. 8. Initial planning has begun to address the beginning balance differences as	25
			1/10/2003	Reconciliations for the month of October have been performed and approved timely (within 45 days of month-end for first quarter reconciliations). All differences have been identified. These differences are being researched for resolution. The reconciliations for the month of November are in progress and are expected to be completed on time.	100
			12/27/2002	A detailed project plan is being developed and is expected to be finalized the week of January 3rd.	00
4	CFO	<i>Implement the proper accounting structure and appropriate internal controls in all systems impacted by FSA's system integration and technology solution initiatives</i>			
<i>Green</i>					
			1/27/2003	A new team, "Program and System Development" will be formed and staffed within the CFO organization to focus primarily on meeting this initiative.	00
			1/10/2003	Project plan is being expanded and will be finalized by 1/13/03. A new team "Program and system Development" will be formed and staffed within the CFO organization to focus primarily on meeting this initiative.	80
			12/27/2002	A detailed project plan is being developed and is expected to be finalized the week of January 3rd.	00



Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
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5	CFO	Develop trial balance capability for each operating partner (ACS, Raytheon, EDS, COD) to facilitate and expedite the reconciliation process			
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Green

3/21/2003	CFO is drafting the project plan and report requirements for the operating partners. The requirements will be presented to OCFO next week. We will meet with the operating partners during the last week of March to present the requirements, answer their questions, and request proposals for the work.	10
3/7/2003	CFO will meet with OCFO next week to begin the work on this initiative.	00
1/27/2003	NO CHANGE	00
1/10/2003	Dependent on issues resolution in other tasks including defining sub-accounts for FSA activity. The project plan for developing trial balances will be prepared mid-February.	00
12/27/2002	CFO is in the process of finalizing a detailed project plan to develop and implement trial balance reporting capability for each operating partner. Draft plan expected 1/31/03.	00

6	CFO	Address material weaknesses and reportable conditions in audits			
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Green

3/7/2003	For FY02 a corrective action plan has not yet been finalized. For FY00, 17 of 18 recommendations are closed. For FY01, 11 of 12 recommendations are closed.  Open Items: FY00 3.4.1 Work with the Department to complete corrective actions on IG Audit CAN 1190013-Review of Security Policies and Plans as referenced in the 2000 FMFIA report.  FY01 - 3.1.1 Implement agreed to corrective actions that address issues identified in the three audits referenced in finding (ED-OIG/A11-B0007, ED-OIG/A11-0009, GAO-01-1067).	90
2/5/2003	OIG and Ernest & Young have issued an unqualified opinion on the FY 02 FSA financial statements. All financial audit related corrective actions have been completed.	50
1/27/2003	All corrective actions have been completed by 12/31/02 and closed in FSA's corrective action system. OCFO and OIG have concurred. Final draft of the financial statements and related notes were submitted on 12/31/02. Audit field work was completed on 01/02/03. FSA received the DRAFT audit opinion on 1/24/03.	50

Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
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1/10/2003		All corrective actions have been completed by 12/31/02 and closed in FSA's corrective action system. OCFO and OIG concurrence is pending.		50
		Final draft of the financial statements and related notes were submitted on 12/31/02. Audit field work was completed on 01/02/03. FSA is waiting DRAFT auditor's opinion and internal control report which is due 01/10/03. FSA will provide a response to both the opinion and internal control review by		
12/27/2002		12 of the 13 audit (FY 2001 Financial Statement Audit) recommendations are scheduled to be completed by 12/31/02.		50

7	FP	Implement Form 2000 enhancements needed since original deployment in October 2000		
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Green

3/21/2003		Draft technical proposal has been reviewed and finalized. First deliverable has been awarded and has a scheduled begin date of 3.10.2003. Project has begun and is on schedule.		00
3/7/2003		Draft technical proposal has been reviewed and finalized. First deliverable has been awarded and has a scheduled begin date of 3.10.2003.		00
2/21/2003		Draft task order has been distributed for review and comment.		00
2/7/2003		Project Team is assembled. Team is working on business case for IRB and preparing draft task order.		00
1/24/2003		Business case approved by DSG and IPC. Pending IRB review and approval.		00
1/10/2003		DSG review has been rescheduled for Tuesday, 1.7.2003.		00
12/27/2002		Business case submitted to DSG. Scheduled for review on Tuesday, 12.31.2002.		00
12/13/2002		Business case justification proceeding through internal review for presentation to DSG.		00

8	STU	Determine the scope of the Debt Management Collection System (DMCS) reengineering		
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Green

<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
			3/21/2003	The project has been 100% completed. The final Milestone statuses are listed below: Received approval from the COO and Director of Acquisition and Contracts to extend the current contract for DMCS for a period of 12 months with a 3 month option. The decision to recompetete under the Common Services for Borrowers window has been approved and the current DMCS contract has been approved for extension	100
			3/7/2003	The decision not to recompetete the DMCS contract as a stand alone was made. The re-engineering of DMCS will be rolled into the CSB initiative. Preliminary Market Research has been conducted for CSB and a report will be provided the week 3/10/03 to the COO, GM for Students and Glenn Perry. Dan Hayward has been selected to be the project manager for this effort. Michael J Murry has been detailed as Acting Manager of Direct Loan Servicing. We have received funding for CSB project and # 20 under "unfunded" is now combined with # 8 "funded". No further reporting on # 8 as it relates to DMCS only. Future reporting will support the CSB actions and	90
			2/7/2003	The decision not to recompetete the DMCS contract as a stand alone was made. The re-engineering of DMCS will be rolled into the CSB initiative.  With the final decision made relating to DMCS re-engineering as a separate initiative,work has begun for market research for an integrated solution for Common Services for Borrowers (CSB). The request for market research information is scheduled to be distributed no later than 2/28/03	90
			1/24/2003	Decision will be made no later than 1/31/03. Discussions within Student Credit Management are occurring weekly.	80
9	SCH	<i>Improve school's fund management, reconciliation, and close out processes</i>			
<i>Green</i>					
			3/21/2003	Steady progress is being made toward the overall project goal.	38
			3/7/2003	Steady progress is being made toward the overall project goal.	33
			2/21/2003	Steady progress is being made toward the overall project goal.	29
			2/7/2003	Steady progress is being made toward the project goal as a whole.	25
			1/27/2003	Overall project Percent Complete is at this point in the year still a straight proration (days elapsed / days in total period), because steady progress is being made toward the project goal as a whole.	21
			12/13/2002	One milestone (9.2) is currently making this project yellow. We think the project is on track and ask that 9.2's completion date be pushed out to 6/30/03. Thanks for your consideration.	07

<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
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10	FP	Stabilize the Lender Application Process (LAP) and Lender Reporting System(LaRS)			
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Green

3/21/2003	No change for this reporting period.	30
3/7/2003	Milestones 10.1 and 10.2 are completed. Meetings will be scheduled to discuss approach for ongoing reviews and monitoring.	30
2/21/2003	All deliverables have been reviewed and accepted. Will provide close-out status for subtasks by next reporting period.	05
2/7/2003	Accenture deliverable was reviewed and accepted.	05
1/24/2003	Pending deliverable approval by business unit (FPC).	05
1/10/2003	NO CHANGE	05
12/27/2002	Approval received from DSG, IPC and Deputy Secretary Hansen.	05
12/13/2002	Funding approved by IPC as of 12.10.2002.	05

11	COO	Enhance Program Monitoring and Oversight			
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12	ACP	Develop and standardize an integrated contract management approach that utilizes performance measures that are directly linked to the business case objectives			
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Green

<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
			1/10/2003	NO CHANGE	10
			12/13/2002	We currently examining best-in-class contract performance management in Government as well as setting up meeting with other Government agencies to discuss their approach.	10
13	ANAL	<i>Create an Enterprise-level dashboard of productivity and performance metrics</i>			
<i>Green</i>					
			3/7/2003	The first edition of the FSA executive dashboard was provided to all FSA managers on Feb 24, 2003. The dashboard provides high level measure of FSA operations. It will be issued weekly by noon on Thursdays.	100
			2/21/2003	Dashboard has been revised and presented to the Sr. Leadership. We should start producing a regular report the week 2/24.	50
			2/7/2003	We met with COO to present the executive dashboard on 2/6/02. We've made some revision and hope to present it to management council shortly.	35
			1/24/2003	We have developed a straw man of the executive dashboard and will be finalizing it shortly. We are receiving data for a large portion of the "operational metrics" section and are working to secure "task order monitoring" and monthly budget data.  We have developed and presented a straw man that will capture more detailed performance data to the Students, Schools, FP and CIO channels. Their staff are inventorying performance data as a first step in coming up with a final design.	33
			12/13/2002	The scope of the project has been defined and meetings to identify and collect the data for the measures will occur in January 2003.	05
14	HR	<i>Develop and/or implement workforce alignment (business processes, skills, etc.) initiatives and actions to support FSA performance goals and One-ED objectives</i>			
<i>Green</i>					
			3/27/2003	Working on the SOO that will procure the resources that will support this initiative.	20
			1/24/2003	Completed business case for workforce alignment team. Will present to DSG on 1/30/03.	50

Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
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15	COO	Implement integrated project management oversight for FSA's system integration initiatives			
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Green

3/7/2003	Need to review Accenture's new monthly Program Leadership and Administration Achievement Report for January and February, 2003. Contractually required to provide feedback to Accenture regarding new report by March 20, 2003. Per Task Order 125, John Fare is designated as person to provide feedback to Accenture.	95
1/24/2003	Still working to redefine Accenture's and FSA's roles and responsibilities reach agreement on level of effort and price	33
1/10/2003	Need to reshape relationship with Accenture for Integration Leadership, Program Management and Contract Administration.	30

16	CIO	Define an enterprise-wide data strategy and high-level implementation approach that addresses the business flow of data across the enterprise, architecture, primary ownership, standards, management, access methods, and quality			
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Red

3/24/2003	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final schemas. The first draft of the Common Student ID solution will be presented to the Business Integration Group (BIG) on Thursday, March 27, 2003 9:00 to 4 p.m. The Technology Strategies team will be conducting their kickoff meeting on Monday, April 1, 10 a.m. The data strategy team has delivered a new business case, Enrollment and Access Management, to be presented to the DSG and IPC for review.	06
3/7/2003	Overall Data Strategy Project is behind schedule but continuing to make progress on some of the teams. The first draft of the Common Record ISIR was completed and posted to the public March 3rd as scheduled. In addition, the Department continues to work with PESC and the FFEL community surrounding the Common Record FFEL and Alternative Loans. We had a successful series of Data Strategy presentations at the Software Developers Conference. We received input for PESC, NCHELP, and the software vendors on FSA's Data Strategy Framework. A number of people requested to participate on our teams to assist with our efforts.  We are currently working on negotiating the details of the technical proposal for the Data Strategy task order. Several meetings have occurred in the past two weeks.	05



<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
			2/12/2003	<p>Keith Wilson was recently appointed as the Project Manager for the Enterprise-Wide Data Strategy Workgroup. FSA team leaders are as follows: Overall Data Strategy - Keith Wilson, Paul Hill - 2nd chair, XML Framework - Holly Hyland, Technical Strategies - Denise Hill, Ganesh Reddy - 2nd chair, XML ISIR - Jeanne Saunders, Common Student ID - Jeanne Saunders, Routing ID - Paul Hill, SAIG Analysis - Keith Wilson. Team Leaders are currently recruiting team members from various areas of FSA to participate on their team.</p> <p>The Data Strategy Kickoff Meeting is scheduled for Wednesday, February 19th @ 10:30 a.m. Accenture Conference Rm 221 A&amp;B (CNN Building side) with all FSA/Accenture team leads and members.</p> <p>2/06/03: Business Integration Group requested a presentation from the Data Strategy team to explain the scope and business objectives related to data work at a high level.</p> <p>This project is designated as red because several milestones are behind schedule and will not meet assigned deadlines.</p>	05
			1/24/2003	<p>Project remains on hold pending senior management discussion and direction. One single task order for entire data strategy initiative still to be awarded.</p>	05
			1/10/2003	<p>Proposed Business Justification (BJ) which covers a majority of the action items under this item was approved by the IPC on 12/18.</p>	05
			2/13/2003	<p>A Proposed Business Justification (BJ) which covers a majority of the action items under this item was completed and presented to DSG on 11/26. BJ provided to channel managers and system integration group members. It is anticipated that the BJ will be presented to the IPC at upcoming meeting. However, once IPC approval is granted, this initiative will require completion and approval of a department business case. This process will be time consuming and is expected to negatively impact upon established action item completion dates. Therefore, the status during this reporting period is</p>	00
17	STU	<i>Analyze Personal Identification Number (PIN) issues related to enterprise wide management/architecture strategy</i>			
<i>Green</i>					
			3/21/2003	<p>Task order has been approved and sent to contracts. We are planning on a 1 1/2 day meeting on April 3-4, 2003 to start looking at the current PIN Process.</p>	07
			2/7/2003	<p>1/29/03 Statement of Objectives were reviewed and forwarded back with comments. Comments were added to the statement of objects which were approved and sent forward.</p>	07
			1/24/2003	<p>Business Case Justificaiton was presented to the DSG and IPC on 1/21 and 1/22. Approval was given by the IPC to conduct the ED PIN Re-Engineering Analysis. Statement of Objectives have been received and are currently being reviewed.</p>	15
			1/10/2003	<p>NO CHANGE</p>	05

Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
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			12/27/2002	A business case is being developed - second draft is currently being reviewed.	05
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18	CIO	Create an overall FSA integrated security and privacy architecture			
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Green

			3/25/2003	This activity will start after the completion of the Security Architecture Framework	00
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			1/24/2003	Agreement on a security and privacy architecture/standards document, including review and approval by the Business Integration Working Group by April 2003. Implementation of one or more proof-of-concept security services as part of the Integrated Technical Architecture by Sept. 2003.	05
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			1/10/2003	Work continues on still yet awarded Security Architecture task order.	05
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			1/3/2003	Task order not yet awarded. Still trying to find consultant with experience in security architectures and solutions common in commercial financial services industries (banking, insurance, loan servicing). Planning on using FSA Integration Group for security service requirements, instead of convening separate security group.	00
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			12/13/2002	The current plan is to avoid a separate "FSA Security & Privacy Architecture Working Group" and make this a task of the "Integration Group". The central task will be developing a security/technology baseline -- what systems (hw/sw) are located where and how are they connected/protected. Providing a definition of security architecture framework which will explicitly include Critical Infrastructure Protection and eGov/eAuth components will also be essential. CIO has requested several milestone completion dates for this item be changed since the anticipated start date of this action is 1/2/03 and several completion dates where targeted for 12/31/02. Therefore, the status of this item is being listed as yellow until clarification on whether or not requested date changes are accepted.	00
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19	STU	Develop and implement initial phases of an enterprise-wide customer service solution that incorporates best-in-business technology and enhanced business processes			
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Red

Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
			2/7/2003	<p>On Friday, January 17, 2003, Accenture was notified that the current Task Order 77, Work Order 5 would be expiring on January 21st. Pursuant to that notification, Accenture has commenced a shutdown process for the CRM4FSA project and the Release 1 Pilot.</p> <p>Included in the shutdown process are:</p> <ul style="list-style-type: none"> <li>· Notifying the Operating Partners that the Release 1 Pilot will be terminated and formulate a "current state" testing plan.</li> <li>· Returning calls to the current state</li> <li>· Dismantling the Operating Partner PBX and IVR changes specific to Release 1</li> <li>· Testing 800 numbers and Operating Partner IVRs</li> <li>· Shutting down the pilot reporting tool</li> <li>· Terminating subcontract agreements, and negotiating final payments</li> </ul> <p>The Release 1 Pilot was successfully shut down on Saturday, February 1st.</p> <p>While the CRM Target State Solution has been deemed "the right thing to do" by FSA, the estimates provided by Accenture, combined with FSA's limited</p>	00
20	STU	<i>Improve the management of student aid through data sharing and consolidating common borrower services and functions</i>			
<b>Green</b>					
			3/21/2003	<p>Funding has been approved for CSB.</p> <p>Funding has been approved for CSB.</p> <p>Market Research was completed for CSB. Approval obtained for COO to continue with project. Funding has been approved by IPC.</p> <p>Interdependencies and constraints: This has been completed as written, however this area needs to be expanded to reflect the scope of the CSB project, since this is now funded.</p> <p>Quick Hits: Scope of project has changed and quick hits will not be implemented</p>	05
			3/7/2003	Initial analysis of common functions has been completed.	05
			2/7/2003	<p>Initial analysis of common functions has been completed. Further drill down into the processes with occur with assistance from SMEs to validate actual common functions.</p> <p>Initial analysis of common functions has been completed. Further drill down into the processes with occur with assistance from SMEs to validate actual common functions.</p> <p>Our "quick hits" are on hold until approval from IPC</p>	00
			1/24/2003	<p>UNFUNDED -</p> <p>20.1 - Initial analysis of common functions has been completed. Further drill down into the processes with occur with assistance from SMEs to validate actual common functions.</p> <p>20.2 - Initial analysis of interdependencies has been completed. Further drill down into the processes with occur with assistance from SMEs to validate actual common functions. Market research will be conducted in February to ascertain best practices and validate findings from internal analysis.</p> <p>20.3 - On hold until approval from IPC</p>	05



Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
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21	STU	Define strategy for EDEExpress reengineering			
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Green

3/21/2003	The Statement of Objective has been sent to contracts.	05
3/7/2003	The Business Justification was presented to the Business Integration Group, the Data Strategy Group (DSG) and the IPC. It is awaiting funding. It is our understanding that the IPC approved this initiative and that funding is forthcoming.	05
2/21/2003	The Business Justification was presented to the Business Integration Group, the Data Strategy Group (DSG) and the IPC. It is awaiting funding.	00
2/7/2003	The Business Justification for Re-engineering EDEExpress has been written and will be presented to the DSG/IPC in the very near future to request funding to study database solutions, migrated standalone modules to the Web and conduct a Product Registration survey.	00
1/24/2003	UNFUNDED A business justification is being written to present request to DSG/IPC to request funding to study database solutions and move standalone modules to the Web.	05

22	STU	Develop an outreach strategy for Aid Awareness in support of OPE and tied to "No Child Left Behind"			
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23	STU	Upgrade technology and integrate Central Processing System (CPS) across the enterprise			
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Green

1/24/2003	UNFUNDED On-going - A CPS Upgrade Analysis was completed and all scheduled test cycles for the FAFSA 7.0/ED PIN performance testing were completed. As of 1/24/03, all 23 planned performance test cycles covering 12 business processes have been executed and 4 additional cycles for Shadow Direct contingency testing have been executed.	05
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24	CIO	Conduct NSLDS Analysis and begin phased implementation of solution			
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<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
25	CIO	Complete the recommendations outlined in the OIG audit (A07-C001) Audit of Enterprise Architecture, issued September 30, 2002			
26	SCH	Evaluate our participation in all events			
27	SCH	Implement Master Promissory Note for PLUS			
<b>Green</b>					
			3/21/2003	PLUS MPN (paper) is still scheduled for COD 2.0 release on 4/7/03 and is 87% complete. PLUS e-MPN is still scheduled for 5/31/03 and is 28% complete. Project-level Percent Complete averages those percentages.	57
			3/7/2003	PLUS MPN (paper) will go live with COD 2.0, is currently scheduled for 4/7/03, and is 77% complete. PLUS e-MPN implementation is scheduled for 5/31/03 and is 14% complete. Project-level Percent Complete averages those percentages.	45
			2/21/2003	PLUS MPN (paper) is on track for implementation when COD 2.0 goes live. Go-live date is planned for 4/7/03 (percent complete = 67%). PLUS eMPN (electronic), milestone #1, was at 1% complete on 2/21/03 and received funding on 2/26/03. From here forward, the project-level percent complete will average the paper and 'e' PLUS MPN percents complete.	34
28	CFO	Enhance our cash transaction process to accommodate OCFO procedures			
<b>Green</b>					
			3/7/2003	The FSA Cash Team has developed a new accounting treatment to eliminate the current high volume of unmatched transactions associated with 1F010 reporting. This new methodology corrects erroneous postings of payment allocation transactions to FMS and provides for the elimination of timing and permanent differences.	65



Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
			2/11/2003	The FSA Accounting Division is continuing it's weekly meetings with our Operating Partners and FSA Program Offices to identify root causes and solutions to clearing FSA's Fund Balance with Treasury (FBWT) unmatched schedules. Progress on the identification and corrections of our FBWT unmatched schedules is being tracked on individual project plans. Significant progress is being made on these work plans, and the Accounting Division has no concerns in not being able to complete prior to FY'03 fiscal year end.	60
			1/27/2003	In addition to working our various project plans we are complying with OCFO's procedures in submitting manual match corrections to the OCFO Financial Management Operations Division. It is our intention that the volume of manual matched request to OCFO FMO will decrease once many of the business processes and systemic issues are completed in the various Accounting Division has initiated weekly meetings with all Operating Partners to identify all internal control weaknesses associated with cash transactions. FSA Accounting Division and Operating Partners have created individual Project Plans to track the implementation of all proposed cash related business processes and systemic internal control improvements. Operating Partners have begun to implement various internal control improvements for summary deposit and consolidation transactions.	25
			1/10/2003	FSA Accounting Division has initiated weekly meetings with all Operating Partners to identify all internal control weaknesses associated with cash transactions. FSA Accounting Division and Operating Partners have created individual Project Plans to track the implementation of all proposed cash related business processes and systemic internal control improvements.	20
29	FP	Augment Leveraging Educational Assistance Partnerships (LEAP)/Supplemental Leveraging Educational Assistance Partnership (SLEAP) module in the FMS to enable direct electronic data exchange with GAPS and enhance the operational			
30	CFO	Obtain clean financial opinion for ED. Improve FMS internal processes, progs, controls. Support reconcil. b/w FSA Op. Prtnrs, FMS, FMSS, GAPS & Treasury. Integrate w/FSA reengineered systems & perform upgrade analysis & implement Oracle Fed			

Green

Priority#	Channel	Action Item	Status Date	Progress Summary	% Complete
		30.2 Integrate the transaction ID from GAPS - Began end to end testing. Tested Cycle 1 with COD. Waiting for modifications/issue resolution from COD. If COD delay exceeds two weeks this will negatively impact FMS software release date of April 21st. Revised testing schedule from COD- currently on schedule with revised dates. Green - 80% completed.	3/21/2003		60
		30.3 Enhance FMS Operation processing - funding approved (Reengineering splitter and FMS/FMSS GL data interface process). Deliverable for requirements received from Accenture - comments due by 3/21/03. Waiting for final buy-in from Budget Services/OCFO. Yellow - 25% completed.			
		30.5 Implement Guaranty Agency Forms 2000 - Funding approved. Reviewing functional & technical proposal submitted by Accenture. Reports requirements being developed by FMS Division. Project Manager Matt Fontana. Yellow - 20% completed.			
		30.6 Implement Program Change Request - Meeting weekly with Operating Partners to resolve outstanding issues. Program development and issues being tracked. Possible new reconciliation requirements for Raytheon (DMCS). AD reviewing business needs/requirements for Raytheon. New requirements scheduled to be presented to Raytheon 3/24. Green - 30% completed.			
		30.2 Integrate the transaction ID from GAPS - on schedule (TO119). End-to-end testing with Operating Partners started 2/25/03. Green 75% completed	3/7/2003		50
		30.3 Enhance FMS Operations processing - funding approved. (Reengineering splitter and FMS/FMSS interface process). Requirements have been defined. Approval from the IPC for \$700,000 in funding. Yellow 10% completed.			
		30.5 Implement Guaranty Agency Forms 2000 - funding approved. Finalizing requirements for Phase I & Phase II. Yellow 10% completed.			
		30.6 Implement Program Change Request - Meeting weekly with Operating Partners to resolve outstanding issues. Program developed and issues being tracked. Define trial balance requirements and need sub accounts.			
		30.2 Integrate the transaction ID from GAPS - on schedule (TO119) Deliverable 119.1.1 FMS FY'03 Release 2.1 - Approved. Status green 45% completed.	2/11/2003		40
		30.3 Enhance FMS Operations Processing - funding approved. (Reengineering splitter and FMS/FMSS interface process). Draft technical specifications to be presented to Terri Shaw on Wednesday, February 12th. No firm requirements defined. Yellow 10% completed.			
		30.5 Implemented Guarantee Agency Forms 2000 - funding approved. Meeting to finalize technical proposal. Business case completed. Development in 2 phases. (Phase 1 - yellow 10% completed, Phase 2 - yellow 5% completed).			
		30.6 Implement Program Change Request - Meeting weekly with operating partners to resolve outstanding issues. Program developed and issues logs tracked. Yellow 20% completed.			
		30.2 Integrate the transaction ID from GPAS - on schedule (TO119) Deliverable 119.1.1 FMS FY'03 Release 2.1 - Interface Functional Designs delivered and being reviewed for approval. Final sign off due by 1/29. Green 35% completed.	1/27/2003		30
		30.3 Enhance FMS Operations processing - Funding approved. (Reengineering splitter and FMS/FMSS interface process). Meeting with OCFO Budget to finish defining requirements. Requirements gathering still in process. Requested at ATP to begin work. Yellow 5% completed.			
		30.4 Implemented Federal Administrator - Unfunded - No action.			
		30.5 Implement Guaranty Agency Forms 2000 - Funding approved. Meeting to develop Technical Proposal - Yellow 5% completed.			
		30.6 Implement Program Change Request - Meeting weekly with Operating Partners to resolve outstanding issues. Program developed and issues logs being tracked. Yellow 10% completed.			
		30.7 Implement FSA/Title IV Web-based (Drawdown) capability and award process - Unfunded - no action.			



<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
			1/10/2003	<p>30.1 Oracle 8i Database Upgrade - Completed 01/05/03 - Green 100%</p> <p>30.2 Integrate the transaction ID from GPAS - Funding approved. Task Order 119 awarded to Accenture. Functional detail designs completed (5 interfaces to be modified). On schedule per the project plan. Green, 30% completed.</p> <p>30.3 Enhance FMS Operations processing - Funding approved . Reengineering splitter and FMS/FMSS interface process. Meeting with FMS,OCFO, Budget and A/D to define requirements. Requirements gathering still in process. Yellow, 0% completed.</p> <p>30.4 Implement Federal Administrator - Unfunded - No action.</p> <p>30.5 Implement Guaranty Agency Forms 2000 - Funding approved by DSG. Presented to the IPC. Not approved - outstanding issues to resolve. Status - Resolve issues and present to the IPC 1/14/03. Yellow, 0% completed.</p> <p>30.6 Implement Program Change Requests - Change request (CRs) are being prioritized and worked as resources are available. Have completed/closed 20 CRs since 12/17/02. Currently have 63 open CRs however, many appear to contain obsolete requirements/requests. Green, 60% completed.</p>	30
31	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives</i>			
<i>Green</i>					
			3/7/2003	eLoans staff coordinated with partner agencies and submitted revised performance metrics to OMB this week. The performance metrics were requested from all 24 E-Gov initiatives in preparation for Mark Forman's testimony to Congress on March 4. On March 4, we met with partner agency leads and OMB to continue project planning and preparations to move forward once funding is available. On February 20, Innovations/E-Commerce presented a business justification and funding request to the Decision Support Group for the interagency web portals: students.gov and studentjobs.gov. The DSG recommended funding students.gov FY03 baseline operations for \$70,000, and Terri Shaw	10
			1/24/2003	Charlie Coleman, Project Supervisors, and staff are finalizing Microsoft Project Plans for CIO Strategic item 14.	05
32	CFO	<i>Develop an automated tool to administer budgetary resources for FSA's programs and to provide management with the data to effectively manage those resources</i>			
<i>Green</i>					
			3/7/2003	Automating the interface between FMS and FMSS to enhance budgetary fund management is the last step in the process. To get to this final step FSA must change the funding templates in FMS to correspond to Budget Services's budgetary limitations and implement a "splitter" process for the FFEL program. Both activities are well underway.	00
			2/11/2003	Work on this item is being coordinated with activities under CFO-4. Budget Service has requested that FSA align it's fund control with the Departments and develop the FFEL "splitter" to Budget Services and FSA's mutual satisfaction. These are current works in progress. When these fund management and reporting issues are resolved, we will examine tools to use so the FSA's program funds are entered automatically into FMS.	50
			1/27/2003	Proposed project completion date of 3/31/03.	00

<i>Priority#</i>	<i>Channel</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Progress Summary</i>	<i>% Complete</i>
			1/10/2003	A meeting with Budget Service stakeholders William Graham and Larry Kean to determine their concerns, preliminary. Development of 32.1 work plan: "Determine requirement for program fund management that are consistent with legislative and OMB requirements. Proposed project completion date is March 31, 2003. Meeting with accounting and DEVA personnel to establish that opening balances are correct for Program funds - ongoing.	00

# Appendix B - Milestone Status Report

Priority# Channel Action Item

Milestone# Action Item

Channel

Status Date

%Complete

2 COO Develop and execute an FY03 plan to get off the GAO High Risk List

1 Review GAO Guidance, OMB concerns and FY 2002 High Risk Plan outcomes and status

Green

COO

12/13/2002

100

COMPLETED - GAO guidance and GAO, OMB and OIG concerns were reviewed as part of the FY 2003 Performance Planning process. The FY 2002 High Risk Plan outcomes and status were reviewed and discrepancies/issues were provided to Analysis. Resolution of discrepancies/issues were determined by Terri Shaw prior to the finalization of the FY 2003 FSA Performance Plan.

2 Determine necessary action items for FY 2003 and update High Risk plan

Green

COO

12/13/2002

100

COMPLETED - As part of the FSA Performance Plan process, high risk issues/strategies were discussed. Projects were prioritized and included in the FY 2003 Performance Plan which would facilitate improvements in those areas.

3 Validate plan with FSA Senior Leaders, Department Advisors and share with GAO and OIG

Green

COO

12/13/2002

100

The FY 2003 High Risk Plan was finalized as part of the Performance Plan process in November 2002. The plan was validated with FSA Senior Leaders and provided to the Deputy Secretary for concurrence. The plan was also shared with other Department Advisors (OPE) and provided to GAO prior to 11/30. The final version of the plan was shared with the IG on 12/13/02.

4 Finalize plan

Green

COO

12/13/2002

100

COMPLETED - The FSA Performance Plan, which includes the High Risk Plan, was finalized and distributed to FSA Senior Leaders on 11/21/02.

5 Demonstrate progress in having implemented corrective measures through improved accountability mechanism assuring addresses necessary reporting requirements for Performance Plan, Department's Strategic Plan, MIT and President's Management Agenda

Friday, March 28, 2003

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**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>COO</b>		<b>3/7/2003</b>	<b>30</b>
	Improved indicator for success and action items included in proposed final Department Annual Plan for FY 2003-FY 2004.			
<b>Yellow</b>	<b>COO</b>		<b>2/7/2003</b>	<b>30</b>
	The 1st quarter FY 2003 President's Management Agenda update was officially released by OMB which indicated that the High Risk Status improved to a yellow and the progress has improved to a			
<b>Yellow</b>	<b>COO</b>		<b>12/13/2002</b>	<b>05</b>
	FSA worked with the MIT to develop a format for reporting to OMB on a quarterly or more frequent basis (This reporting will support other information sharing needs on progress). First reports on the status of projects are due from responsible managers 12/13/2002.			
<b>6</b>	<b>Develop internal communications infrastructure</b>			
<b>Red</b>	<b>COO</b>		<b>2/7/2003</b>	<b>00</b>
	No progress has been made on this milestone item, although some internal communications have been provided in FSA Communication documents. Action owner should be changed to Marianna			
<b>7</b>	<b>Update plan monthly as necessary</b>			
<b>Green</b>	<b>COO</b>		<b>2/7/2003</b>	<b>33</b>
	Issues list being updated based on FY 2003 Performance and Accountability Challenges and High-Risk Series Reports. Initial review indicates that plans and commitments by FSA to improve its planning and reporting processes; the clean financial statement audit; the Departments Enterprise Architecture framework and FSA's Consistent Data Framework; and the Department's human capital management plan will address outstanding issues - thus supporting a request for reconsideration of the SFA programs high risk designation, particularly in light of the recent clean opinion and the management commitment to invest in financial management and maintain the financial integrity of the Department's financial management systems.			
<b>Green</b>	<b>COO</b>		<b>1/10/2003</b>	<b>25</b>
	GAO-03-241 Report on COD (Pell Grant & DL Integration) issued 12/31/02 that may contain information to be considered in January/February update.			
<b>8</b>	<b>Meet with and/or inform GAO and OMB on progress and internal monitoring regularly</b>			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
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<b>Green</b>	<b>COO</b>	<b>2/7/2003</b>	<b>25</b>	<p>GAO Relations - Finalized response to draft audit and provided GAO information on outstanding loan portfolio to facilitate a more balanced presentation of FSA's Default Management and Prevention Strategies to be used in an audit report scheduled to be issued 2/15/03. Regarding Letter to GAO - Updated based on issuance of FY 2002 Financial Statement Audit and 1/30/03 GAO Management Challenges and SFA Program High Risk Reports to assure that issues are appropriately address prior to requesting a mid-cycle determination. Additional analysis and conversations with GAO being held on recently issued High Risk Series update. Final letter for request for reconsideration to go out for comments by 2/15/2003 to FSA managers.</p> <p>OMB Relations - OCIO and FSA-CIO held a meeting 1/30/03 with OMB on the Department's Enterprise Architecture. Meeting was successful in demonstrating the Department's framework, which includes FSA. Similar briefing requested for GAO in February.</p> <p>OIG Relations - Forwarded IG request additional ideas for workplan items to address FSA needs, as a follow-up to the COO's meeting with the IG..</p>
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<b>Green</b>	<b>COO</b>	<b>12/13/2002</b>	<b>25</b>	<p>GAO Relations - On 11/25/02, senior FSA and Department managers met with GAO to discuss the SFA programs High Risk Plan status, and provide information on why the designation should be removed. The High Risk Plan and other supporting documents and accomplishments were provided to GAO at that time, to be followed by a written request. At a 12/10/02 GAO exit conference on Department Management Challenges, GAO managers stated that the SFA programs would be designated high risk in their January 2003 update. The Department requested that if FSA gets a clean opinion on its FY 2002 financial statements that GAO review the SFA programs Performance Plan and accomplishments after 6/30/03 for consideration of a mid-year determination. Our request is currently under considered. The written document drafted as a result of the 11/25/02 meeting is being redrafted to reflect the results of this meeting.</p> <p>OMB Relations - A meeting was held with OMB on 11/21/02 to discuss the first quarter's accomplishments on the President's Management Initiatives and Program Initiatives. Preliminary discussions with OMB on their first quarter 2003 draft report indicate that if the status grade for the Department's financial management initiative is raised that the High Risk status could also be raised as the accomplishments and plans to address issues are apparent.</p>
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5 STU *Develop trial balance capability for each operating partner (ACS, Raytheon, EDS, COD) to facilitate and expedite the reconciliation process*

6 Debt Management Collection System (DMCS) complies with FMS subsidiary ledger reconciliation requirements

<b>Green</b>	<b>STU</b>	<b>3/21/2003</b>	<b>45</b>	<p>Funding has been approved for DMCS reconciliation effort with FMS. CFO has in budget for a total of approximately \$145,000.</p>
<b>Green</b>	<b>STU</b>	<b>3/7/2003</b>	<b>35</b>	<p>Semi weekly meetings are being held with contractor , CFO staff and DMCS staff to address trial balance reporting and current recons issues. Weekly meetings are occurring with CFO, contractors (ACS and EDS) to address the trial balance request and also the recon issues for the CFO.</p>

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>STU</b>		<b>1/24/2003</b>	<b>35</b>
	Semi weekly meetings are being held with contractor , CFO staff and DMCS staff to address trial balance reporting and current recons issues. Weekly meetings are occurring with CFO, contractors (ACS and EDS) to address the trial balance request and also the recon issues for the CFO.			
<b>Green</b>	<b>STU</b>		<b>1/10/2003</b>	<b>05</b>
	NO CHANGE			
<b>Green</b>	<b>STU</b>		<b>12/27/2002</b>	<b>05</b>
	NO CHANGE			
<b>Green</b>	<b>STU</b>		<b>12/13/2002</b>	<b>05</b>
	Semi weekly meetings are being held with contractor , CFO staff and DMCS staff to address trial balance reporting and current recons issues. Weekly meetings are occurring with CFO, contractors (ACS and EDS) to address the trial balance request and also the recon issues for the CFO.			

**7 FP Implement Form 2000 enhancements needed since original deployment in October 2000**

**I Gather user comments and requirements**

<b>Green</b>	<b>FP</b>	<b>3/21/2003</b>	<b>95</b>
	Requirements gathering is on schedule and will be completed by 3.21.2003.		

**8 STU Determine the scope of the Debt Management Collection System (DMCS) reengineering**

**I Validate whether to recompute the contract with limited reengineering or pursue increased reengineering through FSA system integration and new technology solution initiatives**

<b>Green</b>	<b>STU</b>	<b>3/7/2003</b>	<b>100</b>
	The decision not to recompute the DMCS contract as a stand alone was made. The re-engineering of DMCS will be rolled into the CSB initiative.		
<b>Green</b>	<b>STU</b>	<b>3/7/2003</b>	<b>100</b>
	Received approval from the COO and Director of Acquisition and Contracts to extend the current contract for DMCS for a period of 12 months with a 3 month option.		

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
Green	STU			2/7/2003	100
	The decision not to recompile the DMCS contract as a stand alone was made. The re-engineering of DMCS will be rolled into the CSB initiative.				
Green	STU			1/24/2003	95
	Decision will be made no later than 1/31/03. Discussions within Student Credit Management are occurring weekly.				
Green	STU			1/10/2003	05
	NO CHANGE				
Green	STU			12/27/2002	05
	NO CHANGE				
Green	STU			12/13/2002	05
	Decision will be made no later than 1/31/03. Discussions within Student Credit Management are occurring weekly.				
2	Commence either a contract recompile or fully reengineering project to redeploy the system				
Green	STU			3/21/2003	100
	The decision to recompile under the Common Services for Borrowers window has been approved and the current DMCS contract has been approved for extension.				
Green	STU			3/7/2003	100
	Preliminary Market Research has been conducted for CSB and a report will be provided the week 3/10/03 to the COO, GM for Students and Glenn Perry. Dan Hayward has been selected to be the project manager for this effort. Michael J Murry has been detailed as Acting Manager of Direct Loan Servicing. We have received funding for CSB project and # 20 under "unfunded" is now combined with # 8 "funded". No further reporting on # 8 as it relates to DMCS only. Future reporting will support the CSB actions and status updates.				
Green	STU			2/7/2003	85
	With the final decision made relating to DMCS re-engineering as a separate initiative,work has begun for market research for an integrated solution for Common Services for Borrowers (CSB). The request for market research information is scheduled to be distributed no later than 2/28/03.				
Green	STU			1/24/2003	75
	Decision will be made no later than 1/31/03. Discussions within Student Credit Management are occurring weekly.				

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
Green	STU		1/10/2003	05
	NO CHANGE			
Green	STU		12/27/2002	05
	NO CHANGE			
Green	STU		12/13/2002	05
	Decision will be made no later than 1/31/03. Discussions within Student Credit Management are occurring weekly.			

**9 SCH Improve school's fund management, reconciliation, and close out processes**

	<b>1</b>	<b>Reduce time to deliver funds to schools</b>		
Green	SCH		3/21/2003	38
	Work to reduce delivery time continues.			
Green	SCH		3/7/2003	33
	Work to reduce delivery time continues.			
Green	SCH		2/21/2003	29
	Work to reduce delivery time continues.			
Green	SCH		2/7/2003	25
	Work to reduce delivery time continues.			
Green	SCH		1/24/2003	21
	Work to reduce delivery time continues.			
Green	SCH		1/10/2003	16
	Work to reduce delivery time continues.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
<b>Green</b>	<b>SCH</b>		<b>12/13/2002</b>	<b>07</b>
	<p>COD and program operations employees began meeting with FSA's new CFO about the need to improve interfaces and revisit joint operations shortly after her arrival in November. This conversation will continue throughout FY03.</p> <p>Also in November, COD Customer Service began calling schools that had not substantiated drawdowns within the first two weeks to remind them of the required reporting timeframes for Pell and Direct Loan. That call is the first in a sequence of planned notifications that will be triggered routinely in the future by a school's failure to report.</p>			
<b>2</b>	<b>Identify improvements and fill gaps in current operational procedures related to reconciliation</b>			
<b>Yellow</b>	<b>SCH</b>		<b>3/21/2003</b>	<b>55</b>
	<p>Request the March 31 completion date be extended to August 31 for the following reasons:</p> <p>* Some reconciliation and closeout system functions are not scheduled for implementation until mid-June. Procedures for these cannot be written at a detailed operational level until the requirements are completed.</p> <p>* Excessive COD workload has required staff assigned to 9.2 to also work on immediate COD issues.</p> <p>In addition, the pending internal controls review initiated by ED OCFO will likely inform reconciliation and closeout process.</p> <p>A draft target state outline of procedures and accompanying flowchart will be completed by March 31.</p>			
<b>Yellow</b>	<b>SCH</b>		<b>3/7/2003</b>	<b>50</b>
	<p>The team has interviewed and received as-is procedures from all FSA groups and OCFO's GAPS group. One meeting, with OCFO's Financial Improvement and Debt Management group (the people who handle school accounts receivable) is outstanding. These conversations have identified gaps in current procedures, opportunities for improved communications between groups, and areas where existing procedures can be optimized. The work effort to flow the process, get buy-in from all parties, and establish detailed, fully integrated procedures is more complicated than the team originally</p>			
<b>Green</b>	<b>SCH</b>		<b>2/21/2003</b>	<b>25</b>
	<p>Work continues on flowing the current process and interviewing FSA components involved in school closeout and reconciliation.</p>			
<b>Green</b>	<b>SCH</b>		<b>2/7/2003</b>	<b>25</b>
	<p>Staff met with FSA/CFO system contact to begin inventorying COD/FMS interface procedures that allow errors to be worked predictably and systematically. Work to identify improvements and fill gaps continues.</p>			
<b>Green</b>	<b>SCH</b>		<b>1/24/2003</b>	<b>25</b>
	<p>CFO has identified project liaison to Schools project lead, and the two parties have agreed that working through roles and responsibilities for COD and FMS is top priority. Scope and scheduling are under discussion. Staff team has been inventorying current reconciliation procedures as they relate to Pell and Direct Loan and is comparing written procedures with what is actually happening.</p>			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>SCH</b>		<b>1/10/2003</b>	<b>16</b>
	A staff team has been established and kicked off today. Initial meeting with CFO will be scheduled Monday. Team lead is developing project plan.			
<b>Green</b>	<b>SCH</b>		<b>12/27/2002</b>	<b>10</b>
	Previously we asked for the end date to be pushed out to 6/30/02. However, the decision has been made to complete the project in-house, making the 3/31/02 end date satisfactory and upgrading the status to green (since we will not have to go through the contracting process).			
<b>Yellow</b>	<b>SCH</b>		<b>12/13/2002</b>	<b>07</b>
	Title IV Delivery has drafted a SOO for a short consulting contract to revisit handoffs, given the ripple effect of changes that accompanied the implementation of COD (including a new customer service unit in Niagara Falls, NY). A short list of local contractors who specialize in this area has been derived from the GSA Schedule. We expect to put the contract out for bid in mid-January.			
<b>3</b>	<b>Implement systematic notifications and operational procedures related to disbursement to drawdown ratios</b>			
<b>Green</b>	<b>SCH</b>		<b>3/21/2003</b>	<b>90</b>
	Awaiting implementation on 3/31/03.			
<b>Green</b>	<b>SCH</b>		<b>3/7/2003</b>	<b>90</b>
	Still on track for 3/31/03.			
<b>Green</b>	<b>SCH</b>		<b>2/21/2003</b>	<b>90</b>
	The implementation of systematic notifications and operational procedures re disbursement:drawdown ratios is again on track for March 31. This was due to a rethink of the automation involved, which will allow completion earlier than expected.			
<b>Yellow</b>	<b>SCH</b>		<b>2/7/2003</b>	<b>90</b>
	Work on the queuing process continues.			
<b>Yellow</b>	<b>SCH</b>		<b>1/24/2003</b>	<b>80</b>
	The automated queueing (that will trigger calls to schools 60 days after drawdown if cash has not been substantiated) is currently in testing. This is reflected in the jump in Pct. Complete. However, a conscious decision has been made to defer implementation until release 2.0 (03-04) comes up, currently scheduled for April 7. Due to the deferral of this automated function, we are changing status to yellow. However, COD CSRs have been running weekly reports and calling schools that are 60 days out for the past couple of months (I.e., a manual process will continue to occur until the automated triggering replaces it).			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
<b>Green</b>	<b>SCH</b>		<b>1/10/2003</b>	<b>16</b>
	NO CHANGE			
<b>Green</b>	<b>SCH</b>		<b>12/27/2002</b>	<b>10</b>
	NO CHANGE			
<b>Green</b>	<b>SCH</b>		<b>12/13/2002</b>	<b>07</b>
	COD Customer Service has begun sending e-mail warnings to schools with unsubstantiated cash at 20 and 30 days. Automated queueing in COD that will trigger calls to schools at 60 days will be implemented in mid-January 2003.			
<b>4</b>	<b>Retire Pell's Recipient Financial Management System (RFMS) and the Direct Loan Origination System (DLOS)</b>			
<b>Green</b>	<b>SCH</b>		<b>3/21/2003</b>	<b>38</b>
	Progressing on schedule.			
<b>Green</b>	<b>SCH</b>		<b>3/7/2003</b>	<b>33</b>
	Progressing on schedule.			
<b>Green</b>	<b>SCH</b>		<b>2/21/2003</b>	<b>29</b>
	Both systems (RFMS and DLOS) are on schedule to be retired by 9/30/03. Newer Pell year data (RFMS) will be migrated to COD. Archive strategy for for DL data and old Pell year data (PGRFMS) is currently being developed.			
<b>Green</b>	<b>SCH</b>		<b>2/7/2003</b>	<b>25</b>
	Preparations are progressing on schedule.			
<b>Green</b>	<b>SCH</b>		<b>1/24/2003</b>	<b>21</b>
	Preparations are progressing on schedule.			
<b>Green</b>	<b>SCH</b>		<b>1/10/2003</b>	<b>16</b>
	NO CHANGE			



**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
<b>Green</b>	<b>SCH</b>		<b>12/27/2002</b>	<b>10</b>
	NO CHANGE			
<b>Green</b>	<b>SCH</b>		<b>12/13/2002</b>	<b>07</b>
	Final-phase planning on all aspects of both system retirements began October 1 and has concluded. We are on track to begin the migration to COD of prior-year Pell data in June/July 2003. Direct Loan data will be archived as follows: years prior to 2001-02 in Spring 2003; 2001-02 by September 2003 (because closure is contingent on booking of final Borrower-Based Academic Year loans).			

**10 FP Stabilize the Lender Application Process (LAP) and Lender Reporting System(LaRS)**

<b>1</b>	<b>Validate submissions and financial processing through regression testing</b>			
<b>Green</b>	<b>FP</b>		<b>3/21/2003</b>	<b>100</b>
	Completed			
<b>Green</b>	<b>FP</b>		<b>3/7/2003</b>	<b>100</b>
	Testing completed successfully and accepted.			
<b>2</b>	<b>Verify the full performance functionality of the extensions built in Oracle Financial Management System (FMS)</b>			
<b>Green</b>	<b>FP</b>		<b>3/21/2003</b>	<b>100</b>
	Completed			
<b>Green</b>	<b>FP</b>		<b>3/7/2003</b>	<b>100</b>
	FMS functionality verified to satisfaction of the CFO.			
<b>3</b>	<b>Establish a CFO/Financial Partners operational management and integration work group</b>			
<b>Green</b>	<b>FP</b>		<b>1/10/2003</b>	<b>05</b>
	Work group participants have been identified.			

**Priority# Channel Action Item**

<i>Milestone#</i>	<i>Action Item</i>	<i>Channel</i>	<i>Status Date</i>	<i>%Complete</i>
Green	FP		12/27/2002	05
	Working to identify participants in work group.			
4	Check and analyze the quarterly submissions for all quarters in FY03 for accuracy and proper accounting treatment and funding transactions			
Green	FP		3/21/2003	00
	No change for this reporting period.			
Green	FP		3/7/2003	00
	FP/CFO Management meeting to discuss approach.			
5	Coordinate submissions, outcomes, remittance processing, and data quality with regional reviews initiative scheduled for FY03			
Green	FP		3/21/2003	00
	No change for this reporting period.			
Green	FP		3/7/2003	00
	FP Management meeting to discuss approach.			

11 ANAL Enhance Program Monitoring and Oversight

1	Develop and deliver an Enterprise-wide Program Monitoring Plan.			
Green	ANAL		1/24/2003	100
	The Director of Grants, Policy and Oversight staff in the Deputy Secretary's office acknowledged receipt of FSA's report on 12/31/03. They will get back to FSA with any comments.			
Green	ANAL		12/27/2002	100
	Report completed on December 27th, will be submitted to the Director of Grants, Policy, and Oversight Staff on December 31st.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
<b>Green</b>	<b>ANAL</b>		<b>12/13/2002</b>	<b>25</b>
	A meeting was held on November 20 with appropriate channel managers or their designees to discuss the requirements of the Annual Monitoring Report. A template was developed and distributed to attendees on November 20 requesting that it be fielded and returned by December 16. The template asks what is being monitored; how; why; and what is done with the findings. The results will be used to develop FSA's report to be submitted by December 30, 2002.			
<b>2</b>	<b>Student Applicant and Disbursement Data</b>			
<b>Green</b>	<b>STU</b>		<b>3/21/2003</b>	<b>25</b>
	No change. We will meet later today to discuss improvements and changes to our verification analysis and will report the results of the meeting in two weeks (3/18/03).			
<b>Green</b>	<b>STU</b>		<b>3/7/2003</b>	<b>25</b>
	On March 18, 2003, we are meeting with our operating partner to finalize changes and improvements to this year's verification analysis.			
<b>Green</b>	<b>STU</b>		<b>2/21/2003</b>	<b>25</b>
	In March 2003, we will meet with operating partners to finalize changes and improvements we will make to this year's verification analysis. Once meetings have been completed, we will finalize the schedule for the analysis. Analysis will be completed in time to program any verification selection criteria changes so that they are in place when the 2004-05 Central Processing System (CPS) starts			
<b>Yellow</b>	<b>STU</b>		<b>1/24/2003</b>	<b>10</b>
	In mid-February 2003, FSA staff plans to meet with contractor staff to develop a schedule for this analysis and decide what improvements we can make to it.			
<b>Green</b>	<b>STU</b>		<b>1/10/2003</b>	<b>05</b>
	NO CHANGE			
<b>Green</b>	<b>STU</b>		<b>12/27/2002</b>	<b>05</b>
	Reporting protocol are being established.			

**2.1 Develop a plan to continue to identify, measure and monitor applicant and payment error**

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>STU</b>	<b>3/21/2003</b>	<b>25</b>
	On 3/10/03, AP staff and our operating partner began the requirements phase for the development and implementation of a multi-year CPS database and ISIR data mart. In addition, on 3/14/03, FSA staff and our operating partners met with IRS research staff to discuss the upcoming statistical studies we plan to do with them to determine this year's estimated baseline of Pell Grant payment error and our verification selection criteria (3/18/03)			
<b>Green</b>		<b>STU</b>	<b>3/7/2003</b>	<b>15</b>
	(1) We are still trying to schedule a meeting with the IRS to work out the details and schedule for this year's IRS statistical studies. We will have a tentative schedule for the study developed by 3/12/03 and plan to review the schedule with IRS staff when we meet. (2) On March 7, 2003, we provided a Statement of Objectives to contracting staff for all of the initiatives outlined in the "Improve Accuracy of Applicant Data" Proposed Business Justification that was approved in January 2003.			
<b>Green</b>		<b>STU</b>	<b>2/21/2003</b>	<b>10</b>
	(1) We are working to schedule a meeting with the IRS and our operating partners to work out the details and schedule for this year's IRS statistical studies, which will be used to (a) refine and improve our verification selection criteria and (b) estimate this year's baseline of erroneous Pell Grant payments. (2) On 2/12/03, AP staff met with operating partner staff to discuss plans to create both a Central Processing System (CPS) multi-year database and an ISIR data mart. The objective of this meeting was to discuss and agree upon a conceptual model for these databases so that we can begin			
<b>Green</b>		<b>STU</b>	<b>1/24/2003</b>	<b>10</b>
	On 1/22/03, the IPC approved the Proposed Business Justification called "Improve Accuracy of Applicant Data." Now that we have approval for the initiatives outlined in that PBJ, AP has scheduled a meeting on 1/27/03 to begin mapping out the next steps, including developing a schedule for			
<b>Green</b>		<b>STU</b>	<b>1/10/2003</b>	<b>05</b>
	NO CHANGE			
<b>Green</b>		<b>STU</b>	<b>12/27/2002</b>	<b>05</b>
	A Proposed Business Justification is being developed.			
<b>2.3</b>	<b>Develop and deliver training to staff on needs analysis, verification and conflicting documentation.</b>			
<b>Green</b>		<b>SCH</b>	<b>3/21/2003</b>	<b>30</b>
	Work is continuing. List of schools with data outliers based on their verification status codes has been prepared. Need to decide how to proceed with these schools.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>SCH</b>	<b>3/7/2003</b>	<b>30</b>
	The kick off meeting of all the volunteers for the Verification Training Workgroup was held 2/26/03. Assignments for development of the materials were made. The Learning Center was booked for Training of Trainers on June 3 & 4th.			
<b>Green</b>		<b>SCH</b>	<b>2/21/2003</b>	<b>25</b>
	Data analysis of verification codes and outliers continues. A draft proposal for training of trainers has been prepared and potential trainers identified.			
<b>Green</b>		<b>SCH</b>	<b>1/24/2003</b>	<b>25</b>
	No change.			
<b>Green</b>		<b>SCH</b>	<b>1/10/2003</b>	<b>25</b>
	The Verification Assessment Module was completed and a draft shared with schools at the EAC conferences. It was very well received. This Module is a part of a set of self-assessment tools for schools to use to voluntarily check their own compliance and find ways to enhance their administrative activities.			
	FSA U sent CMO copies of their training for schools. We can use portions of that to train staff on verif & conflicting documentation. We are analyzing data to identify schools with potential verification issues, which the Case Teams will focus on in 2003. We are also developing a training of trainers, a training agenda, review prototype, and case studies to use in training staff on these			
<b>Green</b>		<b>SCH</b>	<b>12/27/2002</b>	<b>20</b>
	Held discussion with FSA U staff on using their materials for portions of the staff training.			
<b>Green</b>		<b>SCH</b>	<b>12/13/2002</b>	<b>20</b>
	Please re-assign to Edwards/Coombs.			
<b>3.1</b>	<b>Reengineer and streamline Case Management and Oversight (CMO) business processes to reduce decision making timeframe and achieve increased consistency of outcomes</b>			
<b>Green</b>		<b>SCH</b>	<b>3/21/2003</b>	<b>10</b>
	The Task Order for CMO re-engineering was signed on 3-14-03. Project kick off was held 3-18-03. The first task is to document the as-is business processes for CMO.			
	A draft procedure memo for accelerated recert is being reviewed by staff. Project is on target for implementation on 3-21 with staff training on the new process scheduled for the week of 3-24-03.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
<b>Green</b>	<b>SCH</b>		<b>3/7/2003</b>	<b>10</b>
	ATP for Task Order 127 was extended to 3-14-03. Contractor is preparing final technical and cost proposals.			
	Final testing of accelerated recert enhancements was completed 2/28/03. Enhancement goes into production on 3-21-03. A new procedures memo and training for staff is being prepared.			
<b>Green</b>	<b>SCH</b>		<b>2/21/2003</b>	<b>10</b>
	Testing of edits for accelerated recerts is complete. Contractor to fix minor bugs.			
	For Task Order 127, CMO Re-engineering, Authority to Proceed (ATP) was signed on 1-24-03. ATP expires 2-24-03; Request to extend ATP at no cost was sent to Contracts on 2-20-03, with a new exp date of 3-14-03. Need to finalize technical proposal. Held two meetings with Integration Partner to review and discuss technical proposal. Determined number of site visits necessary. FSA is reviewing current draft of tech proposal. Contractor has compiled sources of prior business process work for Case Management areas; began building analysis.			
<b>Green</b>	<b>SCH</b>		<b>2/7/2003</b>	<b>05</b>
	Testing of enhancements (edits) to permit accelerated recertification of school eligibility is scheduled for Feb 11 - 12.			
<b>Green</b>	<b>SCH</b>		<b>1/24/2003</b>	<b>05</b>
	The business case was presented to the DSG on 1-16 and 1-21, and to the IPC on 1-22, and funding approved.			
<b>Green</b>	<b>SCH</b>		<b>1/10/2003</b>	<b>25</b>
	accelerated recert, comments are due to the contractor on 1-10-03 on requirements document.			
<b>Green</b>	<b>SCH</b>		<b>12/27/2002</b>	<b>20</b>
	accelerated recert, no change			
<b>Green</b>	<b>SCH</b>		<b>12/13/2002</b>	<b>20</b>
	CMO is designing, developing, and implementing an accelerated recertification process for school eligibility decisions. Those schools that have no issues can be processed using streamlined automated procedures to increase efficiency. Requirements definition was completed Nov 19, 2002.			

**3.1.1 Implement electronic audits and financial statements**

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>SCH</b>	<b>3/21/2003</b>	<b>95</b>
	The Kickoff for the eZ-Audit Training was held in Chicago for the Chicago Case Management Team on March 13, 2003. Denver training was snowed out & the KC training needs to be re-scheduled due to snowstorm. eZaudit code was frozen and the software migrated into a production environment at the VDC on 3-14. OMB approved the Information Collection request for the A-133 schools to use the web site to submit data. And the eZaudit/PEPS interface is working.			
<b>Green</b>		<b>SCH</b>	<b>3/7/2003</b>	<b>90</b>
	The eZ-Audit team facilitated a User Acceptance Test with a cross section of school representatives on Wednesday, February 26, 2003. Each participant was given scenarios to complete using the eZ-Audit system. These included completion of annual submissions; changes in ownership; reinstatements; mergers; completions of stub audits; etc. All participants reported overwhelming enthusiasm for eZ-Audit. The team received comments, such as "This is going to make my life			
<b>Green</b>		<b>SCH</b>	<b>2/21/2003</b>	<b>85</b>
	Staff met with OMB on 2-10 & 2-19 & briefed them on eZaudits & discussed "A-133" schools (those schools that submit audits to the Clearinghouse). Staff are working toward a solution to have these schools submit electronically to ED & the Clearinghouse.			
<b>Green</b>		<b>SCH</b>	<b>2/7/2003</b>	<b>85</b>
	On January 29, 2003, the eZ-Audit Project Team briefed representatives from the Federal Clearinghouse, OGC and OIG on the eZ-Audit System. Everyone at the meeting agreed that the FAC and eZ-Audit can form a collaborative working arrangement. FAC believes that this is "doable" from an operational standpoint, and sees some real benefits to their business process. FSA has a meeting scheduled with OMB on Feb 10, 2003, to reach agreement on how Education will require institutions filing under A-133 to provide electronic submissions, at least to Education.			
<b>Green</b>		<b>SCH</b>	<b>1/24/2003</b>	<b>80</b>
	On January 9, 2003, the eZ-Audit Project Team briefed Senior FSA and OPE management on the eZ-Audit System. User Acceptance Testing is scheduled for February 18-20 & 25-27, 2003. Training for all FSA users is scheduled to begin the week of March 12th in the Chicago regional office.			
<b>3.1.2</b>	<b>Define requirements and conceptual design for workflow tool to facilitate processes (most likely Postsecondary Education Participation System (PEPS) reengineering)</b>			
<b>Green</b>		<b>SCH</b>	<b>3/21/2003</b>	<b>10</b>
	same as Milestone 11.3.1			
<b>Green</b>		<b>SCH</b>	<b>3/7/2003</b>	<b>10</b>
	Same as Milestone 11.3.1.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>SCH</b>	<b>2/21/2003</b>	<b>10</b>
	For Task Order 127, CMO Re-engineering, Authority to Proceed (ATP) was signed on 1-24-03. ATP expires 2-24-03; Request to extend ATP at no cost was sent to Contracts on 2-20-03, with a new exp date of 3-14-03. Need to finalize technical proposal. Held two meetings with Integration Partner to review and discuss technical proposal. Determined number of site visits necessary. FSA is reviewing current draft of tech proposal. Contractor has compiled sources of prior business process work for Case Management areas; began building analysis.			
<b>Green</b>		<b>SCH</b>	<b>2/7/2003</b>	<b>05</b>
	No change.			
<b>Green</b>		<b>SCH</b>	<b>1/24/2003</b>	<b>05</b>
	As part of the CMO re-engineering project, the business case was presented to the DSG on 1-16 and 1-21, and to the IPC on 1-22, and funding approved.			
<b>Green</b>		<b>SCH</b>	<b>1/10/2003</b>	<b>02</b>
	A business case that addresses workflow tool planning as part of CMO reengineering is scheduled to go to the DSG on 1/14/03 and possibly the IPC 1/15/03.			
<b>3.2</b>	<b>Define measures for compliance/ oversight activities to demonstrate the effectiveness of case management including technical assistance</b>			
<b>Green</b>		<b>SCH</b>	<b>3/21/2003</b>	<b>100</b>
	Requested new data run for liabilities to get more accurate data.			
<b>Green</b>		<b>SCH</b>	<b>3/7/2003</b>	<b>100</b>
	Data received to calculate liabilities measure. Conducting QC cks on the data.			
<b>Green</b>		<b>SCH</b>	<b>2/21/2003</b>	<b>100</b>
	All measures have been defined. In addition, calculations are complete for monitoring coverage (schools with a comprehensive review, schools with a program review, schools with a compliance improvement visit) and management of risk.			
<b>Green</b>		<b>SCH</b>	<b>2/7/2003</b>	<b>50</b>
	Data is still being checked for completeness and accuracy.			
<b>Green</b>		<b>SCH</b>	<b>1/24/2003</b>	<b>50</b>
	3 of the measures have been calculated and are in draft. The back up data is being subjected to a quality check.			



**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
<b>Green</b>	<b>SCH</b>		<b>1/10/2003</b>	<b>25</b>
	Held con call with Phil Maestri , MIT, on 12/30/02 & shared measures. Have begun calculating the FY 2002 measures.			
<b>Green</b>	<b>SCH</b>		<b>12/27/2002</b>	<b>20</b>
	Held con call with Pat Howard & Chris Vierling, IG, on 12/19/02 & shared measures. Rec'd comments on 12-20-02.			
<b>Green</b>	<b>SCH</b>		<b>12/13/2002</b>	<b>20</b>
	Compliance measures have been drafted. Held mtg on 12/10/02 with Linda Paulsen on the measures. Mtg with the IG scheduled for 12/17/02 to share measures.			
<b>3.3</b>	<b>External Training</b>			
<b>Green</b>	<b>FSAU</b>		<b>3/21/2003</b>	<b>40</b>
	No change.			
<b>Green</b>	<b>FSAU</b>		<b>3/7/2003</b>	<b>40</b>
	A training needs survey will be offered a second time to a selected group of EDEExpress users, since the initial response was not large enough. The new survey instrument is currently at OMB for approval, which is expected in two weeks.			
<b>Green</b>	<b>FSAU</b>		<b>2/21/2003</b>	<b>30</b>
	NO CHANGE			
<b>Green</b>	<b>FSAU</b>		<b>2/7/2003</b>	<b>30</b>
	External training currently in progress: 1) Fundamentals of Title IV Administration (formerly Precertification and New FAA Training). These workshops are offered approximately one per month in various locations, and are attended by new schools seeking certification and by less experienced FAAs. 2) Delivery System 2003-04 and Student Eligibility Basics 3) EDEExpress Application Processing. Training programs in development: 1) FSA COACH 2002-03 2) EDEExpress Pell and Direct Loan Processing			
<b>Green</b>	<b>FSAU</b>		<b>12/27/2002</b>	<b>20</b>
	External training is ongoing.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
<b>Green</b>	<b>FSAU</b>		<b>12/13/2002</b>	<b>10</b>
	External training is ongoing.			
<b>3.3.1</b>	<b>Plan, design and build a "100 Series" of basic training for schools</b>			
<b>Green</b>	<b>FSAU</b>		<b>3/21/2003</b>	<b>40</b>
	The team continues reviewing and refining recommendations they will propose for the curriculum development.			
<b>Green</b>	<b>FSAU</b>		<b>3/7/2003</b>	<b>25</b>
	The 100 Series team is submitting the results of a stakeholder survey and their proposals for review in the next few weeks.			
<b>Green</b>	<b>FSAU</b>		<b>2/21/2003</b>	<b>20</b>
	NO CHANGE			
<b>Green</b>	<b>FSAU</b>		<b>2/7/2003</b>	<b>20</b>
	The results of a stakeholder/advisor survey have been compiled. In the next few weeks, the project team expects to develop an outline proposing courses to be included in the core curriculum.			
<b>Green</b>	<b>FSAU</b>		<b>1/24/2003</b>	<b>15</b>
	The project team completed a survey of stakeholders and advisors to collect feedback and recommendations regarding topics, delivery methods, and audience for the "100 Series." Results are being compiled for presentation to the team.			
<b>Green</b>	<b>FSAU</b>		<b>12/27/2002</b>	<b>10</b>
	The 100 series of basic courses on student aid administration will provide the foundation knowledge that all financial aid professionals need to acquire by the end of their first year. The development team was formed in September 2002, and has begun research to establish a baseline for the type and number of courses needed.			
<b>3.3.2</b>	<b>Develop and deliver a program integrity training for schools through a combination of videoconferences , web-based training, and classroom experiences</b>			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
<b>Yellow</b>	<b>FSAU</b>		<b>3/21/2003</b>	<b>60</b>
	<p>FSA COACH 02-03-did not pass 508 testing, and revisions to the product are currently being made. Depending on the re-testing, we are still attempting to meet the scheduled release date of April 1st.</p> <p>FSA COACH 2003-04 is still awaiting award of the contract. This product will probably not meet its scheduled release date in July.</p> <p>EDEExpress Basics went live on March 14 and can be accessed by financial aid personnel at <a href="http://fsa4schools.ed.gov/edexpressbasics/">http://fsa4schools.ed.gov/edexpressbasics/</a>. We announced training sessions for the Pell Grant and Direct Loan modules of EDEExpress. This training is designed for schools that will be full participants in COD. These sessions begin in May 2003.</p>			
<b>Green</b>	<b>FSAU</b>		<b>3/7/2003</b>	<b>50</b>
	<p>The 508 testing for FSA COACH 02-03 is scheduled for March 7. The team expects to complete any needed changes and have the updated version of this web-based training live by the end of March.</p> <p>The web-based training on EDEExpress Basics is due for release March 12. The training can be accessed at <a href="http://fsa4schools.ed.gov/edexpressbasics/">http://fsa4schools.ed.gov/edexpressbasics/</a> after that date.</p> <p>FSA COACH 03-04 is awaiting award of the contract. Work on updating the program is expected to begin by the end of March, with a tentative release date in July.</p>			
<b>Green</b>	<b>FSAU</b>		<b>2/21/2003</b>	<b>30</b>
	NO CHANGE			
<b>Green</b>	<b>FSAU</b>		<b>2/7/2003</b>	<b>30</b>
	<p>Workshops for Delivery System training and Student Eligibility Basics continue through the middle of March. EDEExpress Application Processing continues through early April.</p> <p>Web-based training for EDEExpress is on schedule to go live at the end of February. FSA COACH for 2002-03 is scheduled for release in March.</p>			
<b>Green</b>	<b>FSAU</b>		<b>1/24/2003</b>	<b>30</b>
	<p>Three classroom-based training programs are in progress: Delivery System, Student Eligibility Basics, and EDEExpress Application Processing (for intermediate-level users of the software). EDEExpress Basics, which is web-based training for new users to learn basic EDEExpress functions, is on schedule for release in February.</p>			
<b>Green</b>	<b>FSAU</b>		<b>12/27/2002</b>	<b>20</b>
	<p>Delivery System and Student Eligibility training workshops continue in mid-January. The first workshops for EDEExpress Application Processing training begin in mid-January.</p>			
<b>Green</b>	<b>FSAU</b>		<b>12/13/2002</b>	<b>20</b>
	<p>Program integrity training for schools is ongoing. Most recently two videoconferences gave information about changes to the 2003-04 delivery system to college and high school personnel. Classroom training on student eligibility basics and delivery system changes will begin in December and continue through March in 65 locations nationwide</p>			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
4.1	Enhance the use of available financial partner data by implementing Phase III of the Financial Partners Data Mart			
Green	FP		3/21/2003	00
	The Anticipated Start Date for this effort has been changed to 4.15.2003.			
Green	FP		3/7/2003	00
	FSA Management discussions are scheduled to be concluded by Friday, 3.14.2003.			
Green	FP		2/21/2003	00
	The business justification presentation was postponed due to ongoing FSA Management discussions.			
Green	FP		2/7/2003	00
	Presentation of this business justification to DSG was deferred pending outcome of FSA Management discussion on data sources for FP Data Mart. Presentation now scheduled for Monday, 2.10.2003.			
Green	FP		1/24/2003	00
	Meeting scheduled to discuss draft business case review. Tentatively scheduled for DSG presentation on Thursday, 1.30.2003.			
Green	FP		1/10/2003	00
	Continuing with review of draft business case in preparation for DSG presentation.			
Green	FP		12/27/2002	00
	Draft business case in internal review. Pending submission to DSG. Tentatively scheduled for DSG review at 1.9.2003 meeting.			
Green	FP		12/13/2002	00
	Business case justification for FP Data Mart Release III is in work.			
4.2	Continue enhanced oversight of lenders/servicers and guarantee agencies through improved consistency and risk management tools			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>FP</b>		<b>3/21/2003</b>	<b>36</b>
	Reviews of the New Jersey and Georgia guaranty agency were completed. The review of the North Dakota guaranty agency commenced 3.17.2003. Reviews of the Pennsylvania will commence on 3.31.2003. Financial Partners staff participated in a con-call on 3.19.2003 to discuss findings, outcomes and observations of the New Jersey, Georgia and Brazos (servicer) reviews completed.			
<b>Green</b>	<b>FP</b>		<b>3/7/2003</b>	<b>31</b>
	Completed reviews at Educaid and the Higher Education Servicing Corporation. Reviews of the Brazos Higher Education Authority, COSTEP as well as the Georgia guaranty agency are in process week of March 3. Review of the New Jersey guaranty agency will commence March 10. An information sharing con-call was held on March 5, 2003 with all FP staff to discuss finding, outcomes and recommendations of the Educaid and Higher Educaiton Servicing Corp.			
<b>Green</b>	<b>FP</b>		<b>2/21/2003</b>	<b>17</b>
	Completed reviews at the Alabama Commission on Higher Education and the Arkansas SLGF. Reviews for Great Lakes Educational Loans and Educaid started 2.10.03 and are in progress. The review for the Higher Education Servicing Corporation is scheduled to commence on 2.24.03			
<b>Green</b>	<b>FP</b>		<b>2/7/2003</b>	<b>17</b>
	Reviews are being conducted at the Alabama Commission on Higher Ed and the Arkansas SLGF as of 2.3.2003. A con-call will be held on 2.12.03 to discuss the findings/outcomes of the Alabama review. The following servicers are scheduled to be reviewed 2.10.03 and 2.24.03, respectively: Great Lakes Educational Loans, Educaid, and Higher Education Servicing Corp.			
<b>Green</b>	<b>FP</b>		<b>1/24/2003</b>	<b>13</b>
	National reviews are underway. The New Mexico SLGC and Vermont SAC reviews are completed. A debriefing was conducted for both reviews. Findings and observations were discussed with entire review staff, as well as recommended corrective actions. Next on the review calendar are the Alabama Commission on Higher Ed and the Arkansas SLGF. Both of these reviews are scheduled for			
<b>Green</b>	<b>FP</b>		<b>1/10/2003</b>	<b>00</b>
	First scheduled National Review is the New Mexico SLGC. A debriefing meeting is set for Wednesday, 1.22.2003.			
<b>Green</b>	<b>FP</b>		<b>12/27/2002</b>	<b>00</b>
	Teams and schedules established. National reviews will commence on Monday, 01.06.2003.			
<b>Green</b>	<b>FP</b>		<b>12/13/2002</b>	<b>00</b>
	FY03 Review List completed and review teams assigned.			

**5 Risk Management and Default Prevention Strategies**

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
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Green	STU			1/24/2003	32
Sent letters to several Guaranty Agenices requesting a sharing of information of Best Practices. Received a positive response from 3 major "players". Reviewing calendar ro set up initial sharing meeting. A library of best practices gathered by Collections Dept. during the past year with visits to GAs is forthcoming this month. A integrated approach plan for Portfolio/Risk Management will be drafted no later than 3/15/03.					

**5.1 Demonstrate improved risk management and default prevention strategies**

Green	STU			3/7/2003	40
An integrated approach project plan for Default Prevention Strategies will be drafted no later than 3/31/03. The date slipped 2 weeks due to inclement weather and Spring Conference. An enterprise wide team has been identified and will meet before 3/31/03.					

Green	STU			1/24/2003	32
Sent letters to several Guaranty Agenices requesting a sharing of information of Best Practices. Received a positive response from 3 major "players". Reviewing calendar ro set up initial sharing meeting. A library of best practices gathered by Collections Dept. during the past year with visits to GAs is forthcoming this month. A integrated approach plan for Portfolio/Risk Management will be drafted no later than 3/15/03.					

Green	STU			1/10/2003	05
NO CHANGE					

Green	STU			12/27/2002	05
Action plans are being refined to insure and validate the integrated approach for scope, success measurements, internal and external participants.					

12 STU *Develop and standardize an integrated contract management approach that utilizes performance measures that are directly linked to the business case objectives*

**5 Establish outcome-based performance measures and framework for FSA and partners to manage performance**

Yellow	STU			3/7/2003	05
On Hold - Awaiting C&A Leadership					

Yellow	STU			2/7/2003	05
Please see project #12 update for details.					

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>		<b>Status Date</b>	<b>%Complete</b>
<b>Yellow</b>	<b>STU</b>  Current Status -- Performance measures framework was being established around CRM4FSA. Due to project cancellation, the Students Channel will work with Acquisitions and Contracts Performance to determine a viable alternative and next steps.		<b>1/24/2003</b>	<b>05</b>
<b>Green</b>	<b>STU</b>  NO CHANGE		<b>1/10/2003</b>	<b>05</b>
<b>Green</b>	<b>STU</b>  Project initiated on 10/2/02.		<b>12/27/2002</b>	<b>05</b>
<b>5.1</b>	<b>Convene Performance Measures Working Group</b>			
<b>Yellow</b>	<b>STU</b>  Same update as 12.5		<b>3/7/2003</b>	<b>05</b>
<b>Yellow</b>	<b>STU</b>  Please see project #12 update for details.		<b>2/7/2003</b>	<b>05</b>
<b>Yellow</b>	<b>STU</b>  Current Status -- Performance measures framework was being established around CRM4FSA. Due to project cancellation, the Students Channel will work with Acquisitions and Contracts Performance to determine a viable alternative and next steps.		<b>1/24/2003</b>	<b>05</b>
<b>Green</b>	<b>STU</b>  NO CHANGE		<b>1/10/2003</b>	<b>05</b>
<b>Green</b>	<b>STU</b>  NO CHANGE		<b>12/27/2002</b>	<b>05</b>
<b>Green</b>	<b>STU</b>  A Performance Measures Working Group was established with representatives from the entire FSA enterprise. To date, three meetings have occurred.		<b>12/13/2002</b>	<b>05</b>

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
5.2	Develop industry best practice framework to manage performance			
Yellow	STU		3/7/2003	05
	Same update as 12.5			
Yellow	STU		2/7/2003	05
	Please see project #12 update for details.			
Yellow	STU		1/24/2003	05
	Current Status -- Performance measures framework was being established around CRM4FSA. Due to project cancellation, the Students Channel will work with Acquisitions and Contracts Performance to determine a viable alternative and next steps.			
Green	STU		1/10/2003	05
	NO CHANGE			
Green	STU		12/27/2002	05
	NO CHANGE			
Green	STU		12/13/2002	05
	Initial work has included developing an inventory of all customer interaction performance measures from current contracts. The inventory has been drafted, and measuers are now being categorized.			
5.3	Pilot proposed framework on measuring customer interaction			
Yellow	STU		3/7/2003	05
	Same update as 12.5			
Yellow	STU		2/7/2003	05
	Please see project #12 update for details.			



<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>%Complete</i>
<b>Yellow</b>	<b>STU</b>	<b>1/24/2003</b>	<b>05</b>
	Current Status -- Performance measures framework was being established around CRM4FSA. Due to project cancellation, the Students Channel will work with Acquisitions and Contracts Performance to determine a viable alternative and next steps.		

1 Begin to align with/participate in One-ED

Green	HR	3/21/2003	95
HR participants on One-ED teams will present final recommendations within the next two weeks.			

<b>Yellow</b>	<b>FSAU</b>	<b>3/7/2003</b>	<b>90</b>
	The teams for HR and Training have been rescheduled to make presentations to the EMT in mid-March.		

Green	FSAU	2/21/2003	80
	NO CHANGE		

Green	HR	2/21/2003	50
Working/collaborating with One-Ed as appropriate			

<i>Green</i>	<b>FSAU</b>	<b>2/7/2003</b>	<b>80</b>
	No Change. The One-ED team still expects to present their final report on a date in February to be determined.		

<i>Green</i>	<b>FSAU</b>	<b>1/24/2003</b>	<b>80</b>
	The team is at the last stage of preparing a business case analysis. They are scheduled to present their final report to the EMT in mid-February.		

Green	FSAU	12/27/2002	50
The One-ED team is finalizing the business case analysis.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>FSAU</b>		<b>12/13/2002</b>	<b>10</b>
	Participation in One-ED is ongoing. The FSAU team has completed its process mapping and benchmarking, and is preparing the business case analysis.			
<b>Green</b>	<b>HR</b>		<b>12/13/2002</b>	<b>10</b>
	Assigned two HR employees to work on Department One Ed team (6 month details).			
<b>10</b>	<b>Add the career counseling component to FSA Career Zone</b>			
<b>Green</b>	<b>HR</b>		<b>2/7/2003</b>	<b>50</b>
	DSG and ICP approved funding. Will work with C&A to develop SOW			
<b>Green</b>	<b>HR</b>		<b>1/24/2003</b>	<b>50</b>
	Funding for career counselors have approved and set aside . Next step is to collaborate to with Contracts and Acquisitions to develop SOW.			
<b>Green</b>	<b>HR</b>		<b>12/13/2002</b>	<b>10</b>
	Presented business case to DSG for obtaining services of career counselors for Career Zone.			
	Career Zone space for career counselors approximately 75% completed.			
<b>10.1</b>	<b>Obtain adequate funding</b>			
<b>Green</b>	<b>HR</b>		<b>3/21/2003</b>	<b>100</b>
	Obtained lpc approval 1/29/03			
<b>Green</b>	<b>HR</b>		<b>2/21/2003</b>	<b>100</b>
	DSG approved funding in weekly meeting.			
<b>Green</b>	<b>HR</b>		<b>2/7/2003</b>	<b>100</b>
	Funding approved by ICP			
<b>Yellow</b>	<b>HR</b>		<b>1/24/2003</b>	<b>25</b>
	Will present business case to DSG on 1/30/03.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
10.4	Work with Acquisitions and Contract Performance (ACP) to develop Statement of Work (SOW) and the feasibility of interagency agreements.			
Green	HR		3/21/2003	95
	Expected completion next week			
11	Ensure availability of physical space for service providers			
Green	HR		2/7/2003	75
	Space on 7th floor approx. 80% complete. May need to find alternate location in UPC			
3	Define HR systems requirements and work with ED (Time and Attendance, Retirement)			
Green	HR		12/13/2002	10
	Attended two meetings with FSA and Dept personnel regarding futureHR systems automation needs.			
4	Align functions, unit configuration, and work responsibilities with new system integration and technology solutions			
Green	FP		3/21/2003	00
	FP project representative identified. Project lead will be contacting FP representative to brief on current status.			
Green	FP		3/7/2003	00
	No update for this reporting period.			
Green	FP		2/21/2003	00
	No update for this reporting period.			
Green	FP		2/7/2003	00
	No update for this reporting period. Waiting for announcement of kick-off meeting.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Yellow</b>	<b>STU</b>		<b>2/7/2003</b>	<b>00</b>
	The students channel no longer has this need due to CRM4FSA is not being funded - and that was the "driver" for this action item. Another "driver" was CSB (Common Services for Borrowers), in Student Credit Management. Since SCM is moving to Borrower Services in the reorganization, the Students Channel has no role. We will continue to support FSAU and HR, and use their resources as appropriate, but we no longer will need to report.			
<b>Green</b>	<b>FP</b>		<b>1/24/2003</b>	<b>00</b>
	No update for this reporting period.			
<b>Green</b>	<b>CIO</b>		<b>1/10/2003</b>	<b>10</b>
	NO CHANGE			
<b>Green</b>	<b>STU</b>		<b>1/10/2003</b>	<b>05</b>
	NO CHANGE			
<b>Green</b>	<b>STU</b>		<b>12/27/2002</b>	<b>05</b>
	Student's representatives and reporting personel have been assigned.			
<b>Green</b>	<b>CIO</b>		<b>12/13/2002</b>	<b>00</b>
	CIO Mgt held two initial meetings the week of 12/2/02 working on this issue. A follow-up meeting is scheduled for 1/15/03.			
<b>5</b>	<b>Expand Career Zone (CZ) offerings to include new system and technology solutions</b>			
<b>Green</b>	<b>FSAU</b>		<b>3/21/2003</b>	<b>40</b>
	Career Zone is continuing its "CZ Tech" series of skill exchanges, in which various IT-related topics are covered. Most recently a course on COD was offered to FSA staff.			
<b>Green</b>	<b>FSAU</b>		<b>3/7/2003</b>	<b>20</b>
	No change.			
<b>Green</b>	<b>FSAU</b>		<b>2/21/2003</b>	<b>20</b>
	NO CHANGE			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>FSAU</b>	<b>2/7/2003</b>	<b>20</b>
	A CZ tech class on COD is scheduled for February 25. Opening of the CZ facility is still expected in March.			
<b>Green</b>		<b>FSAU</b>	<b>1/24/2003</b>	<b>10</b>
	Business case for the Career Zone was approved. CZ Tech classes continue along with other skill exchanges. The official opening of the Career Zone facility in Union Center Plaza is tentatively scheduled for March.			
<b>Green</b>		<b>FSAU</b>	<b>12/27/2002</b>	<b>10</b>
	Awaiting business case approval			
<b>Green</b>		<b>FSAU</b>	<b>12/13/2002</b>	<b>10</b>
	Awaiting business case approval. However, several milestones are already in progress: The Career Zone tech courses are ongoing, and the first course in "Title IV Basics" for staff that will be offered through the CZ is in development. Topic is the Pell Grant Program.			
<b>5.1</b>	<b>Expand Career Zone offering to include Title IV basics - programs, delivery system, negotiated rulemaking. Build and deliver "Partnering for Performance" sessions</b>			
<b>Green</b>		<b>FSAU</b>	<b>3/21/2003</b>	<b>30</b>
	The standard template for delivery of the introductory Title IV program classes has been developed, and the first of these (Pell) is in its second draft. The template calls for a two-person team to deliver the training: a facilitator who will cover the background and in-class activities, and a Subject Matter Expert who will trace the course of program dollars through the organization to the recipients.			
<b>Green</b>		<b>FSAU</b>	<b>3/7/2003</b>	<b>25</b>
	The course on Basic Federal Accounting Procedures began Tuesday, March 4, with an enrollment of 25 FSA staffers. The class meets every Tuesday morning for ten weeks. 36 CPE's will be granted to those who complete the course.			
<b>Green</b>		<b>FSAU</b>	<b>2/21/2003</b>	<b>20</b>
	NO CHANGE			
<b>Green</b>		<b>FSAU</b>	<b>2/7/2003</b>	<b>20</b>
	A regulatory update session for UCP staff was presented on January 28. A new class on basic Federal Accounting is scheduled to begin in February. The class consists of ten, morning-long sessions that will be offered over a course of ten weeks.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>FSAU</b>		<b>1/24/2003</b>	<b>10</b>
	A regulatory update session for UCP staff is scheduled for January 28. One of Franklin Covey's professional development classees, "Four Roles of Leadership," was recently offered. Introductory Title IV program courses are under development,			
<b>6</b>	<b>Review, update and use the FSA skills catalog</b>			
<b>Yellow</b>	<b>FSAU</b>		<b>3/21/2003</b>	<b>10</b>
	No change. The task order is still stalled.			
<b>Yellow</b>	<b>FSAU</b>		<b>3/7/2003</b>	<b>10</b>
	The task order is stalled, so work has not begun on this project. The task order is currently being revised.			
<b>Green</b>	<b>FSAU</b>		<b>2/7/2003</b>	<b>10</b>
	NO CHANGE			
<b>Green</b>	<b>FSAU</b>		<b>1/24/2003</b>	<b>10</b>
	The business case was approved, and meetings are underway to determine strategy.			
<b>Green</b>	<b>FSAU</b>		<b>12/27/2002</b>	<b>10</b>
	Awaiting business case approval			
<b>Green</b>	<b>FSAU</b>		<b>12/13/2002</b>	<b>10</b>
	Awaiting business case approval. However, several milestones are already in progress: The Career Zone tech courses are ongoing, and the first course in "Title IV Basics" for staff that will be offered through the CZ is in development. Topic is the Pell Grant Program.			
<b>6.1</b>	<b>Review and update FSA skills catalog</b>			
<b>Yellow</b>	<b>FSAU</b>		<b>3/21/2003</b>	<b>00</b>
	See comment for milestone 6.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
Yellow	FSAU		3/7/2003	00
	See comment for milestone 6.			
Green	FSAU		2/7/2003	00
	NO CHANGE			
Green	FSAU		1/24/2003	00
	Start date TBD.			
6.2	Conduct gap analyses based on skills catalog (business units TBD)			
Yellow	FSAU		3/21/2003	00
	See comment for milestone 6.			
Yellow	FSAU		3/7/2003	00
	See comment for milestone 6.			
Green	FSAU		2/7/2003	00
	NO CHANGE			
Green	FSAU		1/24/2003	00
	Start date TBD.			
6.3	Provide learning opportunities to fill skills gaps			
Yellow	FSAU		3/21/2003	00
	See comment for milestone 6.			
Yellow	FSAU		3/7/2003	00
	See comment for milestone 6.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>			
Green	FSAU		2/7/2003	00
	NO CHANGE			
Green	FSAU		1/24/2003	00
	Start date TBD.			
7	Develop learning track for case management teams			
Green	FSAU		3/21/2003	20
	No change.			
Green	FSAU		3/7/2003	20
	No change.			
Green	FSAU		2/21/2003	20
	The project team completed a milestone plan for five competencies in the learning track. Development of curriculum begins in early March and will be ongoing.			
Green	FSAU		2/7/2003	15
	NO CHANGE			
Green	FSAU		1/24/2003	15
	The Case Manager Learning Track project team held a check-in meeting with Schools Channel management on the work completed to date. The validity of the approach was confirmed, and a milestone plan is under development.			
Green	FSAU		12/27/2002	10
	awaits business case approval			
Green	FSAU		12/13/2002	10
	The Case Management learning track is well underway. Much of the research and analysis of job-specific skills has been accomplished, and the course developers are working closely with the clients to identify other skills.			



**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
7.1	Conduct research and analysis of skills needed to perform specific jobs			
Green	FSAU No change.		3/21/2003	80
Green	FSAU No change.		3/7/2003	80
Green	FSAU Research and analysis of skills is nearly complete for the Data Analysis learning track.		2/21/2003	80
Green	FSAU NO CHANGE		2/7/2003	10
Green	FSAU Skill analyses are underway. An assessment of the data analysis portion has been completed.		1/24/2003	10
7.2	Create the curriculum, focusing on "data driven" approach			
Green	FSAU No change.		3/21/2003	05
Green	FSAU No change.		3/7/2003	05
Green	FSAU Curriculum development is beginning for five competencies in the learning track: identify, retrieve, analyze, apply, and present data. Learning methods will include online tools, job aids, and videoconferencing.		2/21/2003	05
Green	FSAU NO CHANGE		2/7/2003	00

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
Green	FSAU	Start date TBD.	1/24/2003	00
7.3	Conduct skills assessment			
Green	FSAU	No change.	3/21/2003	00
Green	FSAU	NO CHANGE	3/7/2003	00
Green	FSAU	Start date TBD.	1/24/2003	00
7.4	Provide learning options to fill gaps			
Green	FSAU	No change.	3/21/2003	00
Green	FSAU	NO CHANGE	3/7/2003	00
Green	FSAU	No change.	2/21/2003	00
Green	FSAU	Start date TBD.	1/24/2003	00
8	Align Manager Excellence Training to focus on Performance and Accountability			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>FSAU</b>		<b>3/21/2003</b>	<b>30</b>
	The first Manager Excellence session will be attended by FSA's Management Council on April 3. The sessions for FSA rating officials will be begin on April 23, and will be held once a week for approximately seven weeks. The sessions will include a section on Rewarding Performance.			
<b>Green</b>	<b>FSAU</b>		<b>3/7/2003</b>	<b>20</b>
	Draft curricula have been developed for (a) a kickoff session with the Management Council and (b) six sessions with FSA Rating Officials. The first session for Management Council members is tentatively scheduled for March 27.			
<b>Green</b>	<b>FSAU</b>		<b>2/21/2003</b>	<b>15</b>
	At its Feb. 14th meeting, the Management Council gave its endorsement to continuing "Leadership" Excellence in FY'03 and asked FSAU to come back with a more detailed plan in 2-3 weeks. The Management Council is tentatively scheduled for March 27th for the first of a series of kickoff sessions for all FSA managers that will be held between April and June.			
<b>Green</b>	<b>FSAU</b>		<b>2/7/2003</b>	<b>15</b>
	On February 14, FSA University is scheduled to make a presentation to the Management Council on the Manager Excellence program for 2003.			
<b>Green</b>	<b>FSAU</b>		<b>1/24/2003</b>	<b>10</b>
	NO CHANGE			
<b>Green</b>	<b>FSAU</b>		<b>12/27/2002</b>	<b>10</b>
	NO CHANGE			
<b>Green</b>	<b>FSAU</b>		<b>12/13/2002</b>	<b>10</b>
	The business case for the managers' program has been partially approved.			

**15 COO Implement integrated project management oversight for FSA's system integration initiatives**

<b>1</b>	<b>Provide program management support for FSA system integration and new technology solution initiatives</b>			
<b>Green</b>	<b>COO</b>		<b>3/7/2003</b>	<b>100</b>
	Monitoring all active and pending Accenture Task Orders on a project and program basis.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>COO</b>	<b>1/24/2002</b>	<b>70</b>
	Monitoring all active and pending Accenture Task Orders			
<b>1.1</b>	<b>Issue a task order under the Modernization Partner Contract to ensure continued support for integration, leadership, direction setting, reporting and contract/subcontract management</b>			
<b>Green</b>		<b>COO</b>	<b>3/7/2003</b>	<b>90</b>
	Integration and Leadership Support Task Order (#126; Project Lead: Jeanne Saunders) and Contract Management Task Order (#132; Project Lead: John Fare) were awarded to Accenture on March 6, 2003. Outstanding item: FSA must review the January and February Accenture integration report and provide feedback on content and format by March 20, 2003.			
<b>Green</b>		<b>COO</b>	<b>1/24/2003</b>	<b>85</b>
	Restructuring Integration Leadership based task orders and waiting for final proposal.			
<b>2</b>	<b>Formalize FSA Integration Group</b>			
<b>Green</b>		<b>SCH</b>	<b>2/7/2003</b>	<b>100</b>
	FSA Integration Group was formalized in today's Management Council meeting.			
<b>Yellow</b>		<b>SCH</b>	<b>1/24/2003</b>	<b>50</b>
	GM, Schools, and COO still need to meet to finalize the charter and proposed list of members, as far we know. When that happens, Pct. Complete will go from 50 to 100%. We are showing status as yellow, not red, because the original core group (though not yet formalized as far as we know) continues to meet and make decisions.			
<b>Green</b>		<b>SCH</b>	<b>1/10/2003</b>	<b>50</b>
	The core group that has historically met about integration has convened, written and reviewed a charter, met with the COO, and compiled a list of suggested members. The final draft is now with Kay, who will meet with the COO soon to finalize.			
<b>Green</b>		<b>SCH</b>	<b>12/27/2002</b>	<b>20</b>
	NO CHANGE			
<b>Green</b>		<b>SCH</b>	<b>12/13/2002</b>	<b>20</b>
	COO is reviewing enterprise proposal now.			

**Priority# Channel Action Item**

**Milestone# Action Item**

**Channel**

**Status Date**

**%Complete**

16 CIO Define an enterprise-wide data strategy and high-level implementation approach that addresses the business flow of data across the enterprise, architecture, primary ownership, standards, management, access methods, and quality

1 Identify the strategic focus areas necessary to develop a cohesive enterprise-wide data strategy

Yellow CIO 2/21/2003 10

The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.

Red CIO 1/24/2003 05

Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A draft Statement of Objectives (SOO) for contractor resources that includes this activity was written by the EITM data team. Establishment of the core strategy team is required for this task. A draft Statement of Objectives (SOO) for contractor resources was written by the EITM data team. This SOO also addressed sub action items related to the overall data strategy document and activities under 16.2 including the mapping of business flows, data inventories, redundant data analysis and summary, and the completion of a target state assessment for business data integration. The development and content of this statement of focus will need to be addressed with the cross functional project team. Achieving the performance plan target date of 1/31/03 was contingent on acquiring this contract support in sufficient time for product delivery. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.

2 Collaborate with all internal Department stakeholders and external stakeholders to identify business needs and requirements with respect to the data provided to FSA by others, provided by FSA to others, and managed by FSA

Green FP 3/21/2003 00

No change for this reporting period.

Green FP 3/7/2003 00

Kick-off meeting conducted on Wednesday, 2.26.2003. Team leads were identified and teams are being assembled.

Red CIO 2/21/2003 05

The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
<b>Green</b>	<b>FP</b>		<b>2/21/2003</b>	<b>00</b>
	Original kick-off meeting was canceled and rescheduled. Kick-off meeting will now take place on Wednesday, 2.26.2003.			
<b>Green</b>	<b>FP</b>		<b>2/7/2003</b>	<b>00</b>
	Kick-off meeting conducted on Wednesday, 2.6.2003.			
<b>Yellow</b>	<b>SCH</b>		<b>2/7/2003</b>	<b>50</b>
	Cross-functional team has been established. Team leads have been selected, and kickoff meeting has been held. Those are very positive indicators. However, this milestone will read yellow until the estimated Percent Complete bears a closer relation to the percent of days elapsed in the total reporting period, and we are more confident that the Completion Date deadline can be met.			
<b>Green</b>	<b>CIO</b>		<b>1/24/2003</b>	<b>05</b>
	Remains On hold pending senior management discussion and direction. Key managers listed as responsible persons under action item 16 were contacted on Dec. 20, 2002 and all agreed to constitute the core cross-functional data strategy team. The formal cross-functional team kick-off meeting that was scheduled for Jan. 13, 2003 was cancelled. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			
<b>Green</b>	<b>FP</b>		<b>1/24/2003</b>	<b>00</b>
	No update for this reporting period.			
<b>Yellow</b>	<b>SCH</b>		<b>1/24/2003</b>	<b>50</b>
	Although the 16.2 planned Completion Date is 6/30/03, we have gone to yellow on this milestone. The Success Measure column includes a soft date of 12/31/02 for this milestone, it wasn't met, and we haven't heard that this has been addressed definitively. GM-Schools, and the new CIO have met together and with the COO, to try to ensure that the technology and business functions partner productively this year. However, this team is not set as far as we know, and that is holding up milestone activity under project 16.			
<b>Red</b>	<b>CIO</b>		<b>1/10/2003</b>	<b>05</b>
	The SOO to address the the overall data strategy document and activities under 16.2 including the mapping of business flows, data inventories, redundant data analysis and summary, and the completion of a target state assessment for business data integration is being formulated. Key managers were contacted on Dec. 20, 2002 and all agreed to constitute the core cross-functional data strategy team. Additional membership was discussed and additional participant names were suggested by the core team members. Due to holiday leave schedules, the first formal cross-functional team kick-off meeting is scheduled for Jan. 13, 2003. Additional membership will be solicited to help ensure enterprise representation for these cross-cutting efforts and key contractor personnel will be included in future meetings as appropriate. The final development and content of the overall data strategy SOO will be addressed with the cross functional project team during meetings the week of Jan. 13. Achieving the target date of 1/31/03 is contingent on acquiring contract support in sufficient time for product delivery. Therefore, for this reporting period, the overall status of 16 is being reported as yellow.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
	<b>Channel</b>		<b>Status Date</b>	
Green	STU		1/10/2003	05
	NO CHANGE			
Green	STU		12/27/2002	05
	A Comprehensive Work Plan is being developed and FSA project team has been established.			
2.1	Map the current state and future state business flow of data, as applicable, across the enterprise			
Green	FP		3/21/2003	00
	Reference milestone 16.2 for status update.			
Green	FP		3/7/2003	00
	Reference milestone 16.2 for status update.			
Yellow	CIO		2/21/2003	10
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
Green	FP		2/21/2003	00
	Original kick-off meeting was canceled and rescheduled. Kick-off meeting will now take place on Wednesday, 2.26.2003.			
Green	FP		2/7/2003	00
	Kick-off meeting conducted on Wednesday, 2.6.2003.			
Green	CIO		1/24/2003	05
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A draft Statement of Objectives (SOO) for contractor resources that includes this activity was written by the EITM data team. Establishment of the core strategy team is required for this task. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
<b>Green</b>	<b>FP</b>		<b>1/24/2003</b>	<b>00</b>
	No update for this reporting period.			
<b>2.1.1 Inventory legacy/operational data, including different databases and data stores, to identify redundancy</b>				
<b>Red</b>	<b>CIO</b>		<b>3/21/2003</b>	<b>10</b>
	"Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHelp Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas ""beautiful."" While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final schemas. The first draft of the Common Student ID solution will be presented to the Business Integration Group (BIG) on Thursday, March 27, 2003 9:00 to 4 p.m. The Technology Strategies team will be conducting their kickoff meeting on Monday, April 1, 10 a.m. The data strategy team has delivered a new business case, Enrollment and Access Management, to be presented to the DSG and			
<b>Green</b>	<b>FP</b>		<b>3/21/2003</b>	<b>00</b>
	Reference milestone 16.2 for status update.			
<b>Green</b>	<b>FP</b>		<b>3/7/2003</b>	<b>00</b>
	Reference milestone 16.2 for status update.			
<b>Red</b>	<b>CIO</b>		<b>2/21/2003</b>	<b>05</b>
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
<b>Green</b>	<b>FP</b>		<b>2/21/2003</b>	<b>00</b>
	Original kick-off meeting was canceled and rescheduled. Kick-off meeting will now take place on Wednesday, 2.26.2003.			
<b>Green</b>	<b>FP</b>		<b>2/7/2003</b>	<b>00</b>
	Kick-off meeting conducted on Wednesday, 2.6.2003.			



**Priority# Channel Action Item**

Milestone#	Action Item	Status	Date	%Complete
Green	CIO		1/24/2003	05
	Remains On hold pending senior management discussion and direction. IPC and Department approval obtained. This activity is one component of the overall action item 16. A draft Statement of Objectives (SOO) for contractor resources that includes this activity was written by the EITM data team. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO			
Green	FP		1/24/2003	00
	No update for this reporting period.			
2.1.2 Determine where business data should be integrated				
Yellow	CIO		3/21/2003	10
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final			
Green	FP		3/21/2003	00
	Reference milestone 16.2 for status update.			
Green	FP		3/7/2003	00
	Reference milestone 16.2 for status update.			
Yellow	CIO		2/21/2003	10
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
Green	FP		2/21/2003	00
	Original kick-off meeting was canceled and rescheduled. Kick-off meeting will now take place on Wednesday, 2.26.2003.			
Green	FP		2/7/2003	00
	Kick-off meeting conducted on Wednesday, 2.6.2003.			

**Priority# Channel Action Item**

Milestone#	Action Item	Channel	Status Date	%Complete
Green	CIO		1/24/2003	05
	Remains On hold pending senior management discussion and direction. IPC and Department approval obtained. This activity is one component of the overall action item 16. A draft Statement of Objectives (SOO) for contractor resources that includes this activity was written by the EITM data team. Establishment of the core strategy team is required for this task. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			
Green	FP		1/24/2003	00
	No update for this reporting period.			
2.2 Develop requirements and initial design for Common Identifiers for School and Students.				
Yellow	SCH		2/7/2003	05
	Because the cross functional team has been established (16.2), we expect that work can begin shortly and will proceed rapidly, based on experience gained through COD. Those are very positive indicators. However, this milestone will read yellow until the estimated Percent Complete bears a closer relation to the percent of days elapsed in the total reporting period, and we are more confident that the Completion Date deadline can be met.			
Green	CIO		1/24/2003	05
	Status not know - being handled by schools/students channel			
Yellow	SCH		1/24/2003	05
	Although planned completion date is 6/30/03, we think this is now yellow because the cross-functional project team (16.2) has not been definitively established. This milestone is dependent upon the mobilization of that team.			
Green	SCH		1/10/2003	05
	NO CHANGE			
Green	SCH		12/27/2002	05
	Although the formal cross-functional project team has not been finalized, extensive planning and discussion with Students/Application Processing and other enterprise offices occurred during 2002. We expect that this planning will mean the cross-functional team is not starting from scratch in January 2003, and have upgraded the % complete to 5%.			
Green	SCH		12/13/2002	02
	This milestone and 11.3.1.2 both involve a common identifier piece that can only appear in one place, once the FSA integration group has been finalized and these milestones are vetted by it. Anticipated start date is based on the FSA IPC's having approved the draft business case addressing the establishment of the cross-functional project team.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
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**3 Determine Current Data Quality and Establish Target State Plan and Quality Assurance Process**

<b>Yellow</b>	<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>	<p>" Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas ""beautiful."" While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final schemas. The first draft of the Common Student ID solution will be presented to the Business Integration Group (BIG) on Thursday, March 27, 2003 9:00 to 4 p.m. The Technology Strategies team will be conducting their kickoff meeting on Monday, April 1, 10 a.m. The data strategy team has delivered a new business case, Enrollment and Access Management, to be presented to the DSG and</p>
<b>Red</b>	<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>	<p>The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B &amp; C.</p>
<b>Green</b>	<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>	<p>Remains On hold pending senior management discussion and direction. IPC and Department approval obtained. This activity is one component of the overall action item 16. A high level project plan was drafted by the EITM data team for future presentation to the FSA data quality committee that will be established as part of sub action 16.3. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.</p>

**3.1 Evaluate and identify data quality problems and identify correct source of data**

<b>Yellow</b>	<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>	<p>Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final</p>
<b>Red</b>	<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>	<p>The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B &amp; C.</p>

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A high level project plan was drafted by the EITM data team for future presentation to the FSA data quality committee that will be established as part of sub action 16.3. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			
<b>3.2</b>	<b>Develop a data cleansing plan based on cost, value and urgency</b>			
<b>Yellow</b>		<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>
	The first draft of the Common Student ID solution will be presented to the Business Integration Group (BIG) on Thursday, March 27, 2003 9:00 to 4 p.m. The Technology Strategies team will be conducting their kickoff meeting on Monday, April 1, 10 a.m. The data strategy team has delivered a new business case, Enrollment and Access Management, to be presented to the DSG and IPC for review.			
<b>Red</b>		<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
<b>Green</b>		<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A high level project plan was drafted by the EITM data team for future presentation to the FSA data quality committee that will be established as part of sub			
<b>3.3</b>	<b>Develop and administer a data quality process which ensures the FSA projects implement enterprise data standards and quality standards</b>			
<b>Yellow</b>		<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>
	" Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHelp Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas ""beautiful."" While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final schemas. The first draft of the Common Student ID solution will be presented to the Business Integration Group (BIG) on Thursday, March 27, 2003 9:00 to 4 p.m. The Technology Strategies team will be conducting their kickoff meeting on Monday, April 1, 10 a.m. The data strategy team has delivered a new business case, Enrollment and Access Management, to be presented to the DSG and			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Red</b>		<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
<b>Green</b>		<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A high level project plan was drafted by the EITM data team for future presentation to the FSA data quality committee that will be established as part of sub action 16.3. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			
<b>3.4</b>	<b>Establish an FSA data quality committee comprised of both business and technical subject matter experts to ensure that enterprise data standards are addressed within each project</b>			
<b>Red</b>		<b>CIO</b>	<b>2/12/2003</b>	<b>05</b>
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
<b>Green</b>		<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	Remains On Hold pending senior management discussion and direction. IPC and Department approval obtained. The composition of and logistics required to form an FSA enterprise data quality committee will need to be addressed by the cross-functional data strategy team. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			
<b>4</b>	<b>Develop an enterprise-wide extensible markup language (XML) Technical Architecture Framework to enhance data sharing and standardization with our external customers</b>			
<b>Yellow</b>		<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHelp Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Red</b>	<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.		
<b>Yellow</b>	<b>SCH</b>	<b>2/7/2003</b>	<b>05</b>
	Because the cross functional team has been established (16.2), we expect that work can begin shortly and will proceed rapidly, based on experience gained through COD. Those are very positive indicators. However, this milestone will read yellow until the estimated Percent Complete bears a closer relation to the percent of days elapsed in the total reporting period, and we are more confident that the Completion Date deadline can be met.		
<b>Green</b>	<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	A draft technical proposal for this and related XML action item activities was received from Accenture and reviewed by the EITM data team. EITM provided Students Channel project manager verbal and written input to this draft on Jan. 22.		
<b>Yellow</b>	<b>SCH</b>	<b>1/24/2003</b>	<b>05</b>
	Although planned completion date is 3/31/03, we think this is now yellow because the cross-functional project team (16.2) has not been definitively established. This milestone is dependent upon the mobilization of that team.		
<b>Yellow</b>	<b>CIO</b>	<b>1/10/2003</b>	<b>05</b>
	The XML Framework Statement of Objectives (SOO) to obtain contractor support for item 16.4 has been finalized.		
<b>Green</b>	<b>SCH</b>	<b>1/10/2003</b>	<b>05</b>
	NO CHANGE		
<b>Green</b>	<b>SCH</b>	<b>12/27/2002</b>	<b>05</b>
	Although the formal cross-functional project team has not been finalized, extensive planning and discussion with Students/Application Processing and other enterprise offices occurred during 2002. We expect that this planning will mean the cross-functional team is not starting from scratch in January 2003, and have upgraded the % complete to 5%.		

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>		<b>SCH</b>	<b>12/13/2002</b>	<b>02</b>
	<p>The cross functional team must meet in order to finish planning for the XML milestones, for the following reasons:</p> <ul style="list-style-type: none"> <li>- The scope is expanding from one system (COD) to the enterprise, increasing complexity and project risk and thus necessitating enterprise-wide planning.</li> <li>- Because FSA is collaborating with the higher ed standard-setting bodies whose members (schools, servicers, GAs) hold student Title IV data in common with FSA and are on parallel XML development tracks, the team will need to check direction with those bodies to ensure sufficient alignment.</li> </ul>			
<b>4.1</b>	<b>Develop an XML framework including: and FSA XML Vision, XML standards, governance process, methodology, XML technical core components, sector libraries, and schemas</b>			
<b>Yellow</b>		<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>
	<p>Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final</p>			
<b>Red</b>		<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>
	<p>The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B &amp; C.</p>			
<b>Yellow</b>		<b>SCH</b>	<b>2/7/2003</b>	<b>05</b>
	<p>Because the cross functional team has been established (16.2), we expect that work can begin shortly and will proceed rapidly, based on experience gained through COD. Those are very positive indicators. However, this milestone will read yellow until the estimated Percent Complete bears a closer relation to the percent of days elapsed in the total reporting period, and we are more confident that the Completion Date deadline can be met.</p>			
<b>Green</b>		<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	<p>A draft technical proposal for this and related XML action item activities was received from Accenture and reviewed by the EITM data team. EITM provided Students Channel project manager verbal and written input to this draft on Jan. 22.</p>			
<b>Yellow</b>		<b>SCH</b>	<b>1/24/2003</b>	<b>05</b>
	<p>Although planned completion date is 3/31/03, we think this is now yellow because the cross-functional project team (16.2) has not been definitively established. This milestone is dependent upon the mobilization of that team.</p>			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
4.2	Develop an integrated sequencing plan that identifies when and how each initiative will implement the XML framework as part of an overall enterprise data integration plan			
Yellow	CIO	3/21/2003	10	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final
Red	CIO	2/21/2003	05	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.
Yellow	SCH	2/7/2003	05	Because the cross functional team has been established (16.2), we expect that work can begin shortly and will proceed rapidly, based on experience gained through COD. Those are very positive indicators. However, this milestone will read yellow until the estimated Percent Complete bears a closer relation to the percent of days elapsed in the total reporting period, and we are more confident that the Completion Date deadline can be met.
Green	CIO	1/24/2003	05	A draft technical proposal for this and related XML action item activities was received from Accenture and reviewed by the EITM data team. EITM provided Students Channel project manager verbal and written input to this draft on Jan. 22.
Yellow	SCH	1/24/2003	05	Although planned completion date is 3/31/03, we think this is now yellow because the cross-functional project team (16.2) has not been definitively established. This milestone is dependent upon the mobilization of that team.
4.3	Establish Common Record XML format			
Yellow	CIO	3/21/2003	10	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final



**Priority# Channel Action Item**

Milestone#	Action Item	Channel	Status Date	%Complete
Red		CIO	2/21/2003	05
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
Yellow		SCH	2/7/2003	05
	Because the cross functional team has been established (16.2), we expect that work can begin shortly and will proceed rapidly, based on experience gained through COD. Those are very positive indicators. However, this milestone will read yellow until the estimated Percent Complete bears a closer relation to the percent of days elapsed in the total reporting period, and we are more confident that the Completion Date deadline can be met.			
Green		CIO	1/24/2003	05
	A draft technical proposal for this and related XML action item activities was received from Accenture and reviewed by the EITM data team. EITM provided Students Channel project managent verbal and written input to this draft on Jan. 22.			
Yellow		SCH	1/24/2003	05
	Although planned completion date is 3/31/03, we think this is now yellow because the cross-functional project team (16.2) has not been definitively established. This milestone is dependent upon the mobilization of that team.			
4.4	Identify initial requirements and initial design for XML Institutional Student Information Report (ISIR)			
Red		CIO	2/21/2003	05
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
4.5	Complete development activities to implement XML for ISIR for 2004-05			
Green		STU	3/21/2003	25
	Draft Schema, Record Layout/Data Description, Sample XML ISIR were posted to IFAP, on March 4, 2003. They were posted to FSADownload and SAIG Network Message on Tuesday, March 11, 2003.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
Green	STU			3/7/2003	25
	Draft Schema, Record Layout/Data Description, Sample XML ISIR was sent to post on IFAP, FSADownload and SAIG Network Message on Monday, March 3, 2003.				
Green	STU			1/24/2003	15
	16.4.5 - Expanding the Common Record to include ISIR data furthers the concept of standard reusable blocks of similar data that are shared across business processes and will permit real-time transfer of information between delivery partners, operating partners, and FSA and support improved service and program integrity. It will also reduce the number of technologies required by delivery partners to participate in FSA programs reducing administrative burden. Future users of the new format will be FSA, its operating partners, and every post-secondary school and financial partner administering federal financial aid programs. The data sharing through XML will integrate in other integration initiatives and allow all partners in the financial aid delivery process to standardize				
Green	STU			1/10/2003	05
	NO CHANGE				
Green	STU			12/27/2002	05
	NO CHANGE				
Green	STU			12/13/2002	05
	Expanding the Common Record to include ISIR data furthers the concept of standard reusable blocks of similar data that are shared across business processes and will permit real-time transfer of information between delivery partners, operating partners, and FSA and support improved service and program integrity. It will also reduce the number of technologies required by delivery partners to participate in FSA programs reducing administrative burden. Future users of the new format will be FSA, its operating partners, and every post-secondary school and financial partner administering federal financial aid programs. The data sharing through XML will integrate in other integration initiatives and allow all partners in the financial aid delivery process to standardize communication				
5	Develop integrated Data warehouse and data mart strategy				
Yellow	CIO			3/21/2003	10
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final				

**Priority# Channel Action Item**

Milestone#	Action Item	Channel	Status Date	%Complete
Red		CIO	2/21/2003	05
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
Green		CIO	1/24/2003	05
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A draft Statement of Objectives (SOO) for contractor resources that includes this activity was written by the EITM data team. Establishment of the core strategy team is required for this task. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			
5.1	Develop Data Warehouse and Data Mart Vision			
Yellow		CIO	3/21/2003	10
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final			
Red		CIO	2/21/2003	05
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
Green		CIO	1/24/2003	05
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A draft Statement of Objectives (SOO) for contractor resources that includes this activity was written by the EITM data team. Establishment of the core strategy team is required for this task. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			

**5.2 Develop Data Warehouse and Data Mart Framework**

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Yellow</b>		<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final			
<b>Red</b>		<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
<b>Green</b>		<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. A draft Statement of Objectives (SOO) for contractor resources that includes this activity was written by the EITM data team. Establishment of the core strategy team is required for this task. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			

**5.3 Develop technical standards and guidelines**

<b>Yellow</b>		<b>CIO</b>	<b>3/21/2003</b>	<b>10</b>
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final			
<b>Red</b>		<b>CIO</b>	<b>2/21/2003</b>	<b>05</b>
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
<b>Green</b>		<b>CIO</b>	<b>1/24/2003</b>	<b>05</b>
	Remains On hold pending senior management discussion and direction. This activity is one component of the overall action item 16. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
5.4	Develop a strategy for enterprise wide data sharing and distribution (data storage, management and access rights)			
Yellow		CIO	3/21/2003	10
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final			
Red		CIO	2/21/2003	05
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			
Green		CIO	1/24/2003	05
	Remains On Hold pending senior management discussion and direction. A high level project plan for action item 16.5 and its sub action items was developed by the EITM data team. It will need to be presented for input and review to the FSA cross functional data strategy team once they are established and convene. Project dependencies will need to be addressed by the overall data strategy project manager and/or this enterprise group. Establishment of the core strategy team and subcommittees is pending management discussion and direction. Accenture provided FSA with proposal for overall data strategy effort prior to receipt of SOO developed by EITM.			
6	Develop technical standards, conventions, and data management guidelines			
Yellow		CIO	3/21/2003	10
	Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final			
Red		CIO	2/21/2003	05
	The draft task order of the Enterprise Data Strategy (#123) has been delivered to Keith Wilson and the team leaders for review. Request for extension of the authority to proceed(ATP) for additional three weeks was submitted to Contracts and Acquisitions to give FSA sufficient time to review TO and map deliverables to FSAs' Statement of Objectives and Strategic Plan #16 requirements. A high level project plan was included in the draft TO for review. The Kickoff meeting was snowed out on Wednesday, February 19th and rescheduled for Wednesday, February 26th @ 2p.m. in Accenture Conference rm 221 A,B & C.			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status</b>	<b>Date</b>	<b>%Complete</b>
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**7 Review Security and Privacy Procedures and revise as necessary**

<b>Green</b>	<b>CIO</b>	<b>3/21/2003</b>		<b>10</b>
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Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final

<b>Red</b>	<b>CIO</b>	<b>2/21/2003</b>		<b>05</b>
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Part of TO 120. No due date established. No other task depends on this. Draft updated security policy being reviewed.

<b>Red</b>	<b>CIO</b>	<b>12/13/2002</b>		<b>00</b>
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Requested date change from 9/30/03 to 12/31/03.

**8 Develop an enterprise web services/portal strategy**

<b>Green</b>	<b>CIO</b>	<b>3/21/2003</b>		<b>10</b>
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Under Holly Hyland's leadership, FSA (on behalf of PESC) completed final tasks and delivered the draft CommonRecord FFEL and Alternative Loans Schemas to the NCHELP Electronics Standards Council (ESC) yesterday. Steve Margenau, technical resource for ESC and editor of the PESC Technical Specification called the schemas "beautiful." While there are sure to be comments and changes, additional resources (outside of FSA) have been identified to handle these modifications. However, FSA will stay connected with this review process to ensure a smooth delivery of the final

**18 CIO Create an overall FSA integrated security and privacy architecture**

**1 Convene FSA security and privacy architecture working group and provide support for meetings and deliberations**

<b>Green</b>	<b>CIO</b>	<b>1/24/2003</b>		<b>05</b>
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Current plan is to avoid a separate group and make this a task of the "Integration Group". Security Architecture task not yet awarded.

**2 Review past work plan and update the plan with the latest business and technical developments that are applicable**

<b>Green</b>	<b>CIO</b>	<b>1/24/2003</b>		<b>05</b>
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Central task is developing security/technology baseline -- what systems (hw/sw) are located where and how are they connected/protectee? Security Architecture task not yet awarded.

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>CIO</b>		<b>1/10/2003</b>	<b>05</b>
	Date change from 12/31/02 to 2/28/03 was accepted during IPC on 1/8/03.			
<b>Yellow</b>	<b>CIO</b>		<b>12/13/2002</b>	<b>00</b>
	Requested date change from 12/31/02 to 2/28/03.			
<b>3</b>	Integrate FSA needs with Departmental and government wide initiatives (e.g. Critical Infrastructure Protection, Enterprise Architecture, eAuthentication, etc.)			
<b>Green</b>	<b>CIO</b>		<b>1/24/2003</b>	<b>05</b>
	Definition of security architecture framework will explicitly include Critical Infrastructure Protection and eGov/eAuth components Security Architecture task not yet awarded.			
<b>Green</b>	<b>CIO</b>		<b>1/10/2003</b>	<b>05</b>
	Date change from 12/31/02 to 3/31/03 was accepted during IPC on 1/8/03.			
<b>Yellow</b>	<b>CIO</b>		<b>12/13/2002</b>	<b>00</b>
	Requested date change from 12/31/02 to 3/31/03			
<b>4</b>	Recommend technical approaches to each of the security services (e.g., encryption, authentication, etc.) required by FSA (and partner organizations)			
<b>Green</b>	<b>CIO</b>		<b>2/21/2003</b>	<b>00</b>
	Security Architecture task not yet awarded.			
<b>Green</b>	<b>CIO</b>		<b>1/24/2003</b>	<b>05</b>
	Dependent on outcome of 18.1 Security Architecture task not yet awarded.			
<b>5</b>	Identify and estimate the cost of all FSA projects that will require modification to fit within the proposed enterprise security/privacy standards			
<b>Green</b>	<b>CIO</b>		<b>2/21/2003</b>	<b>00</b>
	Security Architecture task not yet awarded.			

**Priority# Channel Action Item**

<i>Milestone#</i>	<i>Action Item</i>	<i>Channel</i>	<i>Status Date</i>	<i>%Complete</i>
Green	CIO		1/24/2003	05
	Dependent on outcome of 18.1 Security Architecture task order not yet awarded.			
Green	CIO		1/10/2003	05
	Date change from 3/31/03 to 4/30/04 was accepted during IPC on 1/8/03.			
Yellow	CIO		12/13/2002	00
	Requested date change from 3/31/03 to 4/30/04.			
6	Implement 1 or more proof-of-concept infrastructure impvmnts, w/intention to develop identity mgt infrastructure (enrollment, use of school/lender XML identity credentials, SSO) to support bus-facing (school/lender/GA, not PIN-based student/borrower) apps			
Green	CIO		2/21/2003	00
	None			
Green	CIO		1/24/2003	05
	Project plan for this element is impossible. All activity under this task dependent on completing first phase of 18.1 Security Architecture task (not yet awarded).			

20 STU *Improve the management of student aid through data sharing and consolidating common borrower services and functions*

1	Identify common functions in Servicing, Consolidation, and Collections			
Green	STU		3/21/2003	05
	Market Research was completed for CSB. Approval obtained for COO to continue with project. Funding has been approved by IPC			
Green	STU		3/7/2003	00
	No longer reported, combined and funded with # 8			

2 Identify interdependencies and constraints for integration of common services



**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
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Green	STU		3/21/2003	05
	This has been completed as written, however this area needs to be expanded to reflect the scope of the CSB project, since this is now funded.			

Green	STU		3/7/2003	00
	No longer reported, combined and funded with # 8			

3 Implement quick hits

Green	STU		3/21/2003	05
	Scope of project has changed and quick hits will not be implemented.			

Green	STU		3/7/2003	00
	No longer reported, combined and funded with # 8			

21 STU Define strategy for EDEExpress reengineering

1 Define Strategy for EDEExpress reengineering

Green	STU		3/21/2003	05
	The Statement of Objective has been sent to contracts.			

Green	STU		3/7/2003	05
	Same update as Project #21.			

25 CIO Complete the recommendations outlined in the OIG audit (A07-C001) Audit of Enterprise Architecture, issued September 30, 2002

1 Implement the OIG recommendations to strengthen the linkages between Enterprise Architecture management and the Capital Planning (Investment Review) processes

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>Green</b>	<b>CIO</b>		<b>3/7/2003</b>	<b>10</b>
	Entrance meeting - October 24, 2001. On December 31, 2001 the IG sent back questions. Consolidated responses were sent back on January 28, 2002 and February 5, 2002. More architecture documents on January 30, 2002 and held a follow up meeting on March 4, 2002 to focus on Enterprise Architecture. 7/15 Exit conference was held - FSA rated mostly 4 on a scale of 1-5. We are currently reviewing the document with the Department and expect to send comments back to the IG by Aug 31. The joint response was sent on August 28. ED and FSA entered the CAP plan into the system on 10/16. Future status is subject to funding availability. 11/21 - Future status is subject to funding availability. The future status is subject to receiving funding. 12/10 - This item intentionally left yellow. Business Justification submitted 12/6. 12/19 - Currently reworking business case. The future status is subject to receiving funding. The revised Business Case was submitted for DSG review on Jan. 9, 2003. Jan 17 - Prelim funding approved by IPC. The item is no. 25 below the line. Funding is subject to the disposition of items 20 -24. The project is RED and at risk. 3/10 - Task Order is in contracts.			
<b>2</b>	<b>Continue to populate, validate the information in the enterprise architecture management tool</b>			
<b>Green</b>	<b>CIO</b>		<b>3/7/2003</b>	<b>10</b>
	Entrance meeting - October 24, 2001. On December 31, 2001 the IG sent back questions. Consolidated responses were sent back on January 28, 2002 and February 5, 2002. More architecture documents on January 30, 2002 and held a follow up meeting on March 4, 2002 to focus on Enterprise Architecture. 7/15 Exit conference was held - FSA rated mostly 4 on a scale of 1-5. We are currently reviewing the document with the Department and expect to send comments back to the IG by Aug 31. The joint response was sent on August 28. ED and FSA entered the CAP plan into the system on 10/16. Future status is subject to funding availability. 11/21 - Future status is subject to funding availability. The future status is subject to receiving funding. 12/10 - This item intentionally left yellow. Business Justification submitted 12/6. 12/19 - Currently reworking business case. The future status is subject to receiving funding. The revised Business Case was submitted for DSG review on Jan. 9, 2003. Jan 17 - Prelim funding approved by IPC. The item is no. 25 below the line. Funding is subject to the disposition of items 20 -24. The project is RED and at risk. 3/10 - Task Order is in contracts.			
<b>3</b>	<b>Procure additional EA tool licenses, tool maintenance</b>			
<b>Green</b>	<b>CIO</b>		<b>3/7/2003</b>	<b>10</b>
	Entrance meeting - October 24, 2001. On December 31, 2001 the IG sent back questions. Consolidated responses were sent back on January 28, 2002 and February 5, 2002. More architecture documents on January 30, 2002 and held a follow up meeting on March 4, 2002 to focus on Enterprise Architecture. 7/15 Exit conference was held - FSA rated mostly 4 on a scale of 1-5. We are currently reviewing the document with the Department and expect to send comments back to the IG by Aug 31. The joint response was sent on August 28. ED and FSA entered the CAP plan into the system on 10/16. Future status is subject to funding availability. 11/21 - Future status is subject to funding availability. The future status is subject to receiving funding. 12/10 - This item intentionally left yellow. Business Justification submitted 12/6. 12/19 - Currently reworking business case. The future status is subject to receiving funding. The revised Business Case was submitted for DSG review on Jan. 9, 2003. Jan 17 - Prelim funding approved by IPC. The item is no. 25 below the line. Funding is subject to the disposition of items 20 -24. The project is RED and at risk. 3/10 - Task Order is in contracts.			
<b>4</b>	<b>Develop a process flow to manage the information in the FSA enterprise architecture</b>			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
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<b>Green</b>	<b>CIO</b>	<b>3/7/2003</b>	<b>10</b>	<p>Entrance meeting - October 24, 2001. On December 31, 2001 the IG sent back questions. Consolidated responses were sent back on January 28, 2002 and February 5, 2002. More architecture documents on January 30, 2002 and held a follow up meeting on March 4, 2002 to focus on Enterprise Architecture. 7/15 Exit conference was held - FSA rated mostly 4 on a scale of 1-5. We are currently reviewing the document with the Department and expect to send comments back to the IG by Aug 31. The joint response was sent on August 28. ED and FSA entered the CAP plan into the system on 10/16. Future status is subject to funding availability. 11/21 - Future status is subject to funding availability. The future status is subject to receiving funding. 12/10 - This item intentionally left yellow. Business Justification submitted 12/6. 12/19 - Currently reworking business case. The future status is subject to receiving funding. The revised Business Case was submitted for DSG review on Jan. 9, 2003. Jan 17 - Prelim funding approved by IPC. The item is no. 25 below the line. Funding is subject to the disposition of items 20 -24. The project is RED and at risk. 3/10 - Task Order is in contracts.</p>
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**5 Develop the requirements and technical product to export the FSA enterprise architecture contents to the Department of Education**

<b>Green</b>	<b>CIO</b>	<b>3/7/2003</b>	<b>10</b>	<p>Entrance meeting - October 24, 2001. On December 31, 2001 the IG sent back questions. Consolidated responses were sent back on January 28, 2002 and February 5, 2002. More architecture documents on January 30, 2002 and held a follow up meeting on March 4, 2002 to focus on Enterprise Architecture. 7/15 Exit conference was held - FSA rated mostly 4 on a scale of 1-5. We are currently reviewing the document with the Department and expect to send comments back to the IG by Aug 31. The joint response was sent on August 28. ED and FSA entered the CAP plan into the system on 10/16. Future status is subject to funding availability. 11/21 - Future status is subject to funding availability. The future status is subject to receiving funding. 12/10 - This item intentionally left yellow. Business Justification submitted 12/6. 12/19 - Currently reworking business case. The future status is subject to receiving funding. The revised Business Case was submitted for DSG review on Jan. 9, 2003. Jan 17 - Prelim funding approved by IPC. The item is no. 25 below the line. Funding is subject to the disposition of items 20 -24. The project is RED and at risk. 3/10 - Task Order is in contracts.</p>
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**27 SCH Implement Master Promissory Note for PLUS**

**1 Implement PLUS electronic Master Promissory Note (eMPN) for DL**

<b>Green</b>	<b>SCH</b>	<b>3/21/2003</b>	<b>28</b>	<p>Still on track for May 31.</p>
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<b>Green</b>	<b>SCH</b>	<b>3/7/2003</b>	<b>14</b>	<p>Direct Loan eMPN funding has been approved by ED after having passed the IPC on February 26. Implementation of this functionality is planned for May 31.</p>
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**31 CIO Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives**

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Channel</b>	<b>Status Date</b>	<b>%Complete</b>
<b>1</b>	<b>E-Gov Support:Implement &amp; participate in cross-gov initiatives includng eLoans proj mgmt (Pres Mgmnt Council E-Gov initiative),participation in E-Authentication &amp; devel e-Commerce solutions for FSA paper processes &amp; promoting standards in student aid</b>			
<b>Green</b>	<b>CIO</b>	<b>3/21/2003</b>	<b>25</b>	
	Charlie Coleman attended ED's pre-EMT meeting on 03/18/03 along with Terri Shaw and Victoria Bateman, and gave a status update on eLoans and eAuthentication. Bill Hansen stated that based on his meeting with Mark Foreman / OMB, that FSA should fund the majority of the eLoans initiative (approximately \$1.5 million) and all of the Department's share of the eAuthentication project (approximately \$2.5 million). Proposals for the project management SOO (Statement of Objectives) are being evaluated, with a selection planned for next week. A contractor should be on-board by April 1. A partner agency leads meeting was held on March 18. Treasury attended the meeting and was receptive to partnering with agencies to explore 'pay.gov' as a possible common solution for collecting lender payments electronically.			
<b>Green</b>	<b>CIO</b>	<b>3/7/2003</b>	<b>10</b>	
	eLoans staff coordinated with partner agencies and submitted revised performance metrics to OMB this week. The performance metrics were requested from all 24 E-Gov initiatives in preparation for Mark Forman's testimony to Congress on March 4. On March 4, we met with partner agency leads and OMB to continue project planning and preparations to move forward once funding is available.			
<b>2</b>	<b>Cross Agency Web Support:Support operations &amp; usability of existing interagency web portals inclndg students.gov (student-centered interagency Web portal partnered w/FirstGov.gov) &amp; StudentJobs.gov (student-centered interagency Web portal partnered w/OPM)</b>			
<b>Green</b>	<b>CIO</b>	<b>3/21/2003</b>	<b>35</b>	
	02/20/03, Innovations/E-Commerce presented a business justification and funding request to the DSG for students.gov and studentjobs.gov. The DSG recommended funding students.gov FY03 baseline operations for \$70,000, and Terri Shaw approved on 02/26/03.(no change)			
<b>Green</b>	<b>CIO</b>	<b>3/7/2003</b>	<b>10</b>	
	On February 20, Innovations/E-Commerce presented a business justification and funding request to the Decision Support Group for the interagency web portals: students.gov and studentjobs.gov. The DSG recommended funding students.gov FY03 baseline operations for \$70,000, and Terri Shaw approved on 02/26/03. (no change)			
<b>3</b>	<b>New Research and Development: Provide support for pilot tests, proofs of concept, research, white paper development, etc. that are identified internally or externally through customers or business</b>			

**Priority# Channel Action Item**

<b>Milestone#</b>	<b>Action Item</b>	<b>Status Date</b>	<b>%Complete</b>
	<b>Channel</b>		
<b>Green</b>	<b>CIO</b>	<b>3/21/2003</b>	<b>25</b>
	Charlie Coleman attended ED's pre-EMT meeting on 03/18/03 along with Terri Shaw and Victoria Bateman, and gave a status update on eLoans and eAuthentication. Bill Hansen stated that based on his meeting with Mark Foreman / OMB, that FSA should fund the majority of the eLoans initiative (approximately \$1.5 million) and all of the Department's share of the eAuthentication project (approximately \$2.5 million). Proposals for the project management SOO (Statement of Objectives) are being evaluated, with a selection planned for next week. A contractor should be on-board by April 1. A partner agency leads meeting was held on March 18. Treasury attended the meeting and was receptive to partnering with agencies to explore 'pay.gov' as a possible common solution for collecting lender payments electronically. 02/20/03, Innovations/E-Commerce presented a business justification and funding request to the DSG for students.gov and studentjobs.gov. The DSG recommended funding students.gov FY03 baseline operations for \$70,000, and Terri Shaw approved on 02/26/03.		